TASKMASTER

MANAGEMENT SOFTWARE USER GUIDE

VERSION 1.721

CHAMBERLAIN®
Access Solutions

Thank you for purchasing TaskMaster® Management Software for your property. For your utmost satisfaction with this product, we recommend that you take the time to review this manual. We also offer comprehensive training to help you become fully accustomed and pleased with your purchase. Please contact Chamberlain Access Solutions at (888) 528-7826 to arrange training for your site. If you have any difficulties, we strongly recommend that you review this manual and the online help within TaskMaster first.

TaskMaster offers the self storage industry's most comprehensive management package. Renting spaces, processing payments, and daily tasks are simplified on our EZ Task menu. TaskMaster's real-time credit card processing module requires no extra equipment or software. Best of all, the new WebXpress module turns TaskMaster into a web site allowing customers to rent spaces, pay bills, and view their customer information.

Chamberlain Access Solutions TaskMaster® management software is licensed for use only to the original purchaser. Refer to the End User License agreement for more details. The license agreement can be viewed at any time in the Online Help System.

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Introduction

- **System Requirements**
- **Opening TaskMaster**
- **Initial Setup Checklist**
- **Overview of Function Navigation**

System Requirements

NOTE: If you are using any other software along with ours, it is imperative that you ensure that your computer specifications more than exceed the combined total requirements for all of the software loaded on the computer.

Computer Requirements

These computer requirements are the minimum for running the software by itself.

- Pentium 4, 1.4 GHz or higher processor
- 1 GB RAM (higher recommended)
- 4+ GB available hard drive space
- CD ROM (with high storage capacity, such as a CD-RW or DVD-RW, available for backups)
- SVGA monitor, 800 x 600 resolution minimum
- Sound card and speakers recommended
- Two or more available working ports [RS232 port(s), USB port(s), or Ethernet TCP/IP port(s)]
- Broadband/high-speed business internet connection (cable, T1, or DSL), always on connection
- Keyboard and Mouse
- A high quality Laserjet or Inkjet printer (for printing Reports)
- Remote access software for technical assistance. To receive technical support, you MUST have remote access software installed on your PC
- Anti-virus software such as McAfee Virus Scan, Symantec's Norton Antivirus, or other major brand
- Firewall protection is strongly recommended (ensure settings do not interfere with other applications running the system). This should be set up by a knowledgeable computer tech as some configuration may be required
- UPS (Uninterruptible Power Supply) power backup and surge protection is recommended. (Part # PPWRUPSAPCBP350)

Operating System

- Microsoft Windows XP Professional Edition, 32-bit*, with Service Pack 2

  or
- Microsoft Vista, 32-bit* with Service Pack 1. (Supported Vista versions: Ultimate, Home Premium, Business, or Enterprise). All necessary updates and service packs for Windows should be loaded onto the computer before beginning installation

* Not all operating systems support all software and some third party products (such as card scanners, cameras, or other peripherals) may not function with some operating systems and/or computers (i.e., 64-bit operating systems may not support peripherals built for use on 32-bit or earlier platforms). All Chamberlain Access Solutions software and peripheral products are manufactured to work on a 32-bit platform and are not compatible with a 64-bit platform. Refer to the product manufacturer's documentation for compatibility information with the operating system in use. Chamberlain Access Solutions is not liable for the functioning or reliability of any third party products and any products recommended are only done so based on historic examples of them working with our product. Chamberlain Access Solutions cannot guarantee any third party product compatibility or their continued functionality. Future releases, updates, upgrades, or other modifications to these products may affect their compatibility with Chamberlain Access Solutions products or with other programs on your computer. We recommend that your computer and network be regularly updated and maintained by a qualified information technology technician.

In addition to the items previously listed, the following are required for operation of TaskMaster Modules.

Camera Module

- TWAIN Compatible Internet camera (Part # RTASPHOTOCAMERA). Camera resolution must be approximately 320 x 240

Credit Card Processing Module

In addition to the items listed above, the following are required for operation of the credit card processing module.

- Current account with Nova Information Systems (now Elavon), Paymentech (now Chase Paymentech), Echo (now Intuit ECHO), or PCCharge (now VeriFone PCCharge). An application fee may be required when registering for an account with one of these companies
- MagTech card swipe (recommended)
- We do not recommend using a wireless keyboard or mouse if you are using the Credit Card Reader

Proximity Cards / Photo ID Badges / Swipe Cards

The following items are recommended for the operation of peripheral devices.

- Compatible Wiegand interface cards for Proximity devices
- Any 4-line magnetic stripe card for use with swipe reader devices
- Preprogrammed blank or logo-imprinted cards can be purchased from Chamberlain Access Solutions for either device type

PayXpress

In addition to the items listed above, the following are required for operation of the PayXpress module.

- TaskMaster management software version 1.537 or higher with PayXpress module
- TaskMaster Credit Card Module
- APEX series keypad version 1.57 or newer with a magnetic credit card reader

Site Graphics

The computer on which the Site Graphics software is running must include the computer requirements listed above as well as the following.

- PTI Graphics Serial Adapter (Part # PGRASIA)
- 16 MB Video Card or higher
- 1024 x 768 Large Screen Monitor recommended

Central Office

- Business High Speed Internet required with an always online static IP (T1 or Cable) at the Central Office Site
- High Speed Internet at each remote site
- FTP host server software
- Firewall that is configured so as not to interfere with remote access or Central Office
- Each computer (Main Site and all Remote Sites) must meet or exceed the minimum system requirements

Networking

- Each computer on the network must meet Chamberlain Access Solutions system requirements
- Each computer must allow remote assistance
- Network must be a client server network with one Server & one or more client workstations
- Must be installed by a trained and experienced Network IT Professional*

  * Chamberlain Access Solutions is not responsible for setting up the network. The user must contract a Network Information Technology Professional for assistance.

WebXpress

- All TCP/IP Ports Open. Provide the following list to the technician installing your router:
  - Port 80
  - Secure Port 443
  - Firewall or Router with Port Forwarding enabled
- Secure Certificate for Microsoft IIS. Available from a variety of providers such as Network Solutions (www.networksolutions.com), Verisign (www.verisign.com), or GoDaddy (www.godaddy.com).
- Must have a registered Domain Name. Available from a variety of providers such as Network Solutions (www.networksolutions.com), Domain Bank (www.domainbank.com), or GoDaddy (www.godaddy.com).

We strongly recommend that installation and setup of all computers and any Chamberlain Access Solutions equipment be done by a certified, licensed, qualified, and competent technician. Chamberlain Access Solutions can recommend local dealers and installers, but it is up to the customer to verify their qualifications and negotiate any pricing or contracts unless we have been specifically contracted in writing to do so for the customer. The above information represents recommended minimum guidelines. These guidelines are subject to change without notice. With any computer setup or configuration, some troubleshooting and adjustment of the configuration may be required. This will differ with every computer setup depending on operating system, software installed on it, quality of components, internet connection, modem connection, or any other variable introduced into the setup. This troubleshooting and configuration may include purchasing additional equipment. In no circumstances will Chamberlain Access Solutions be responsible for any damages either incidental or consequential based on these recommendations.

Computers running any Chamberlain Access Solutions hardware, software, or utilities must meet our computer requirements. These computer requirements are intended as a minimum guideline for operating our access control system. If a customer intends to add third party peripherals to the system, they are responsible for ensuring that the products are compatible with the access control system they have installed.

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Opening TaskMaster

TaskMaster Double-click on the TaskMaster icon on the desktop to start the TaskMaster program. Once the program opens, the **Log In** screen will appear. Select the appropriate user name from the **Operator** drop-down box and enter the password in the **Password** box.

After a period of inactivity or if the current user logs out, this screen will reappear. The first time that you log into TaskMaster, enter the Operator name and Password that were specified on the configuration forms.

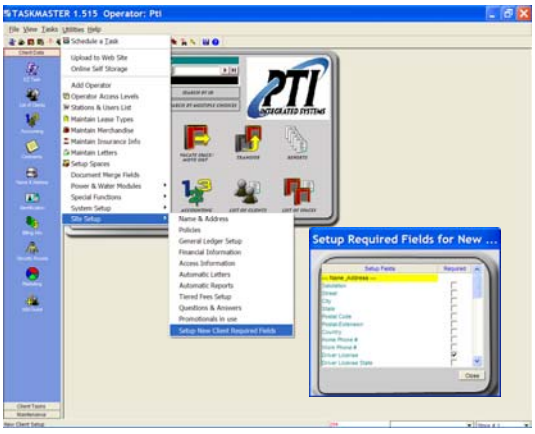
Initial Setup Checklist

For the best experience with the software, please follow this checklist prior to using the product. This initial setup is very important and should be done by the highest unrestricted user (owner, district manager, or high level manager). You may need to review sections that are located elsewhere within this manual to complete these steps.

- Carefully read and review this manual. Also, use this manual while practicing with the TaskMaster demo data before using it for the actual site.

- If the site is a conversion from another software to TaskMaster management software, verify that all information has been transferred successfully. A TaskMaster Conversion Follow-up Recommendations document can be found on our web site or obtained from technical support. This will help you through the initial process following a conversion.

- If your site has not received training on the TaskMaster management software, please contact your sales representative to get details on training. This is highly recommended for you to receive the best performance out of the software.

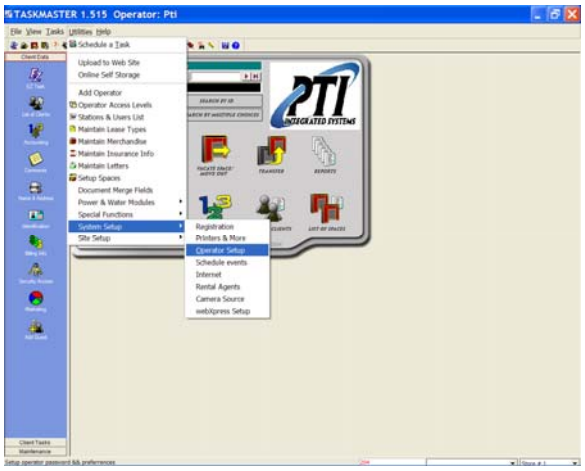


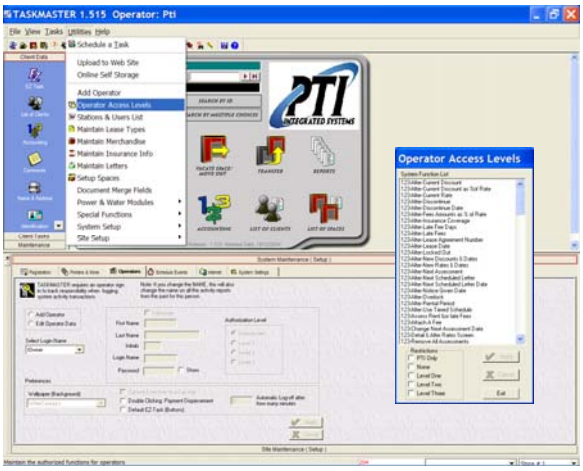
- Set up the fields that will be required for every new rental. On the Taskbar, select Utilities/Site Setup/Setup New Client Required Fields. This will bring up a small window that will allow you to place a checkmark by any fields that you want to require with every new rental.

- Setup Promotions in Use by the site. This feature is set up during conversion. On the Taskbar, select Utilities/Site Setup/Promotions in Use. Place a checkmark in the box next to any promotional discounts that the site offers or plans to offer. This allows these discounts to be selected during the rental process. If your discount is not on the list, and you need it right away, see the Discounts section of the manual for instructions on giving discounts other than the Promotions in Use.

- Add and edit Operators. This feature is set up during conversion when at least one Unrestricted User should have been created. This unrestricted user (usually an owner, district manager, or high level manager) should go into the Operators function and set up all users along with their Operator Access Levels. In the Taskbar at the top of the screen, select Utilities/System Setup/Operator Setup. Select Add Operators to add new operators to the system or Edit Operators to change the access level or inactivate operators that are currently in the system.

  When setting authorization levels, consider that there should be at least one unrestricted user, usually an owner or district manager. Typically, area managers and high level site managers are level 1; regular site managers are Level 2; and assistant managers are Level 3.





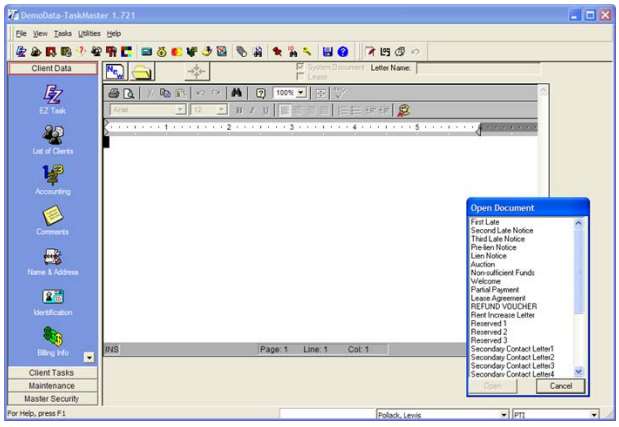
- Schedule Events. Select Utilities/System Setup/Schedule Events. From this screen you can Schedule Automatic Daily Processing (ADP), Automatic Weekly Processing (AWP), and Automatic Monthly Processing (AMP) by clicking on the Reschedule button on the right-hand side of the page.
  - In the Schedule Events Window, Select System – Automatic Daily Processing (ADP), Daily. Click Reschedule and set the time at 3:00 am on the next day after the current day's date. It is important that ADP be scheduled after midnight but well before the next day's business hours.

  - Repeat this process to schedule AWP for the end of week (either the following Saturday or Sunday depending on how your company runs their week). AWP should be scheduled for 10:00 pm on the last night of the week. It must be before midnight, but after business hours.
  - Repeat this process to schedule AMP. AMP should be scheduled for 11:00 pm on the final night of the month. It must be before midnight, but after business hours and not set to the same time as AWP.

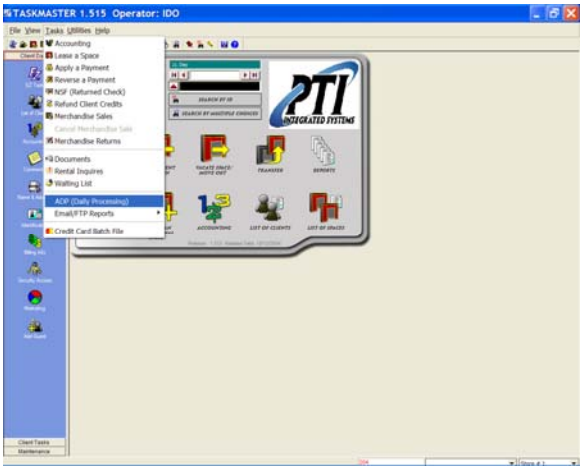
  Click OK after the times are set.

NOTE: Your computer must be left on at these times for the processing to work. Click the X in the upper left-hand corner of the System Maintenance bar to close the screen.

- Setup Letters. On the Taskbar, select Utilities/Maintain Letters. This will allow you to edit the letters that are printed by the system welcoming new customers, collecting on past due items, etc. A number of default letters have been provided, but it is important that you customize the letters to your site and to conform to local laws and regulations. We strongly recommend that all letters be reviewed by a lawyer or other legal resource for legality and regulatory requirements prior to using them at the site. Chamberlain Access Solutions is not liable or responsible if you send out letters that do not conform to legal requirements for collections and auctions. Refer to the Maintain Letters section for more details on merge field definitions, customizing and editing letters, and other related topics.



- Add your logo to reports, invoices, and receipts, if desired. You must have a bitmap image of your logo that measures 2 ½" x 1" at 96 dpi. Save this file in the c:\RTM folder as rptlogo.bmp and as invlogo.bmp. If there are already files of the same name, click Yes to replace the files. This will place your company logo at the top of each report, invoice, and receipt.



- Run the initial ADP to synchronize the system. To run the initial ADP, select Tasks/ADP (Daily Processing). The Automatic Daily Processing window will pop up. Click Activate Now to run the initial ADP.

- If this is a new property (not converted from a previous software), begin data entry of any current clients into the system.

- Once these steps are complete, the software is ready to use.

Overview of Function Navigation

There are 3 bars for navigation through TaskMaster. Most functions are located in multiple places around TaskMaster to make it easy to find the task you want.

Menu bar – located across the top of the TaskMaster window

Toolbar – located across the top of the TaskMaster window under the **Menu bar**

Taskbar – located on the left side of the TaskMaster window

The **Taskbar** is separated into three or four categories that can be selected by clicking on each category's tab. The tabs will be located at either the top or the bottom of the **Taskbar** depending on which one is currently in view.

Client Data tab – contains screens used to view information about each client's account

Client Task tab – contains useful tools used when modifying an account or doing a task for a client such as taking a payment or adding additional spaces

Maintenance tab – used for general facility maintenance

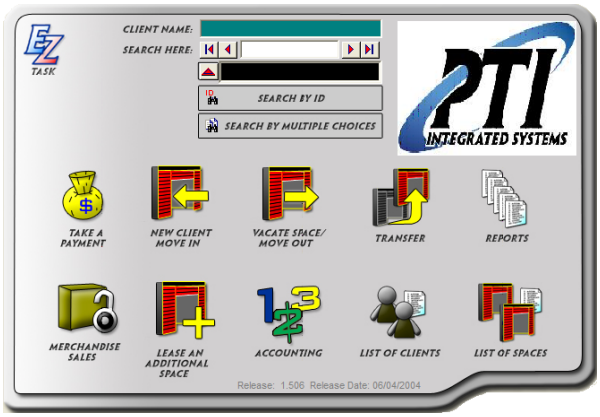
Master Security tab – this tab only appears if you are using the Master Security module for access control. It contains the tools and screens for use within Master Security. This feature is no longer available on current versions of the software.

Daily Operator Tasks

- **EZ Task**
- **Searching in TaskMaster**
- **New Client Move In**
- **Take A Payment**
- **Vacate Space/Move Out**
- **Transfer**
- **Lease an Additional Space**
- **Merchandise Sales**
- **Account Management**
- **Reports**
- **List of Clients**
- **List of Spaces**

EZ Task

The **EZ Task** screen is the default Main screen in TaskMaster, where one can easily maneuver through the most common daily operations in TaskMaster.



To return to this screen from other areas of the program:
From the Taskbar: Click on the **Client Data/EZ** icon.
From the Toolbar: Click on the icon.
From the Menu: Click on **View/EZ Task**.

The EZ Task screen contains ten EZ Task buttons:

Take A Payment – Enter customers rent payments and payment of any outstanding balances

New Client Move In – Wizard that walks through a complete move-in

Vacate Space / Move Out – Moves a customer out of their space

Transfer – Transfers a customer from one space to another

Reports – Contains all the preloaded reports needed to track a business

Merchandise Sales – A retail center to sell products

Lease an Additional Space – Allows customers to rent additional spaces

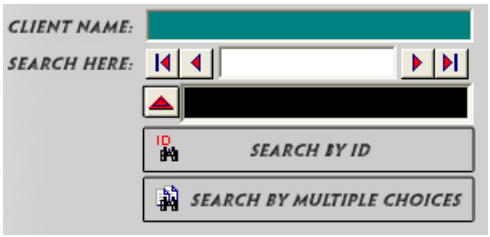
123 Accounting –Displays current spaces being leased and any open balances on the account

List of Clients – Displays all active clients, their guests, and the spaces on each account

List of Spaces – Shows the current inventory of open and rented spaces

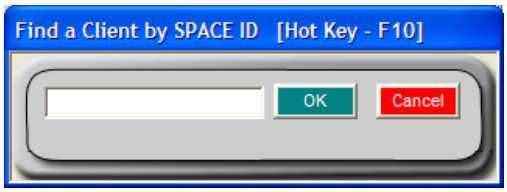
Searching in TaskMaster

There are three fields across the top of the EZ Task screen that can be used for searches.

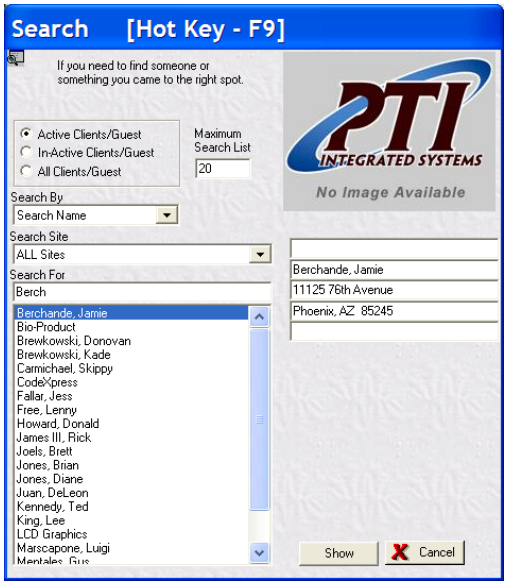


Client Name – The field at the top center is the **Client Name** that TaskMaster is currently focused on. To make changes to an account, the client's name must be in focus in this field. If there is no name in this field, find the client to edit or work with their information.

Search Here – Look up a client using the **Search Here** field by clicking the arrows to each side of the field. The single forward and backward arrows scroll through the list of customer names one at a time. As you scroll through the names, each customer's name will appear in the Client Name field between the arrows. The extended forward and backward arrows take you to the very beginning or end of your customer list. You can also go directly to a specific client by typing their last name in the white search field between the arrows.



To Search for a client by space ID or to find out who is in a specific space, click **Search by ID** located below the Search Here field. This brings up the Find a Client by Space ID window. Type space number in this field and press OK.



To perform a more in-depth search for a client or to search inactive clients, click **Search by Multiple Choices** below the Search by ID button. This window allows you to search by Active Clients and Guests, Inactive Clients and Guests, or All Clients and Guests by clicking in the appropriate field.

You specify to search by Agreement Number, Business Name, Cardcode, Check Number, Client ID Code, Drivers License number, Invoice Number, Space ID, Last Name, Pass Code, Phone Number, Receipt Number, Name, Social Security Number, or Vehicle License by using the drop-down under the **Search By** field.

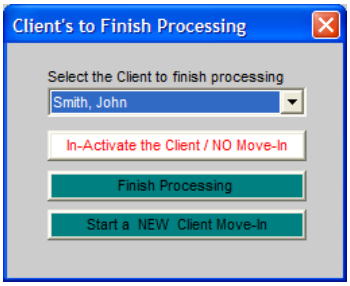
The size of the search result list can be limited by typing a number between 1 and 999 in the **Maximum Search List** field.

Once you have narrowed your search using the above fields, a list of results appears in the lower left-hand corner. Enter a name in the **Search For** field to narrow the list. Click on an item in the list to bring up more information in the fields to the right. Once you have found the correct item, click on it to highlight it and then click on Show to bring up the customer in TaskMaster.

New Client Move In

The **New Client Move In** Wizard is a quick and easy way to move a client in and get all needed client information. **NOTE:** Before a client can be moved in, the site spaces must be set up. See the Setup Lease Spaces section in Chapter 5 for instructions on setting up lease spaces.

To enter the New Client Move In wizard, open the EZ Task screen and click **New Client Move In**.



If a client was partially moved in and move-in still needs to be completed, a dialogue box will appear prompting the user to either finish the client's move in or to start a move in with a new client. To cancel the unfinished move-in, click on Inactivate the Client/No Move-in.

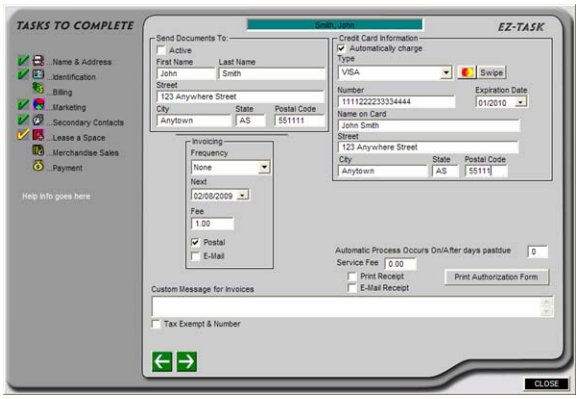
To enter information, tab through each field and complete all applicable information. Yellow fields are required fields. Click on the green forward arrow to continue to the next screen. Click on the green back arrow to return to the previous screen if needed. You can jump ahead to any screen in the list by clicking on the screen name in the upper left-hand corner of the wizard.

The list of screens at the left shows checkmarks next to each topic to track your progress. Green checkmarks indicate screens that have been completed. Yellow checkmarks indicate screens that have incomplete required fields. Help information for each field can be found in the box in the lower left-hand corner of the wizard.

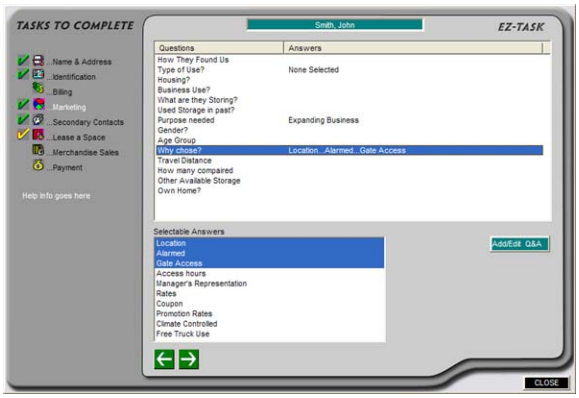
Name & Address – The first screen of the New Client Move In wizard. Input basic information for the client including e-mail address, phone number, driver license number, and gate code.

Identification – Input information to help identify the customer including date of birth and the type of vehicle that will be stored. If the site is using the Camera Module, you can also take a picture of the client at this time.

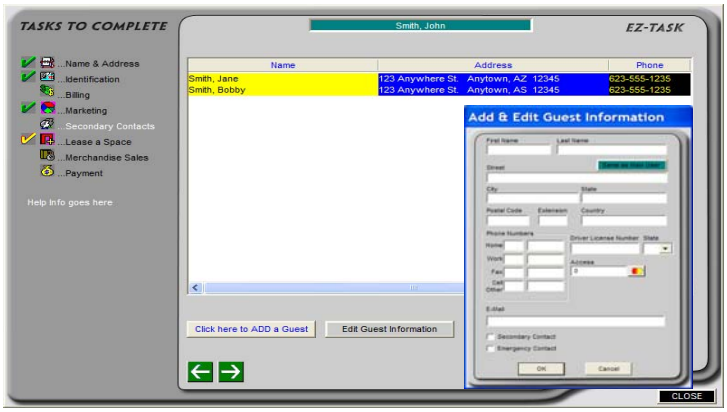
Billing – Set up an alternate billing address, if required, and credit card billing information.



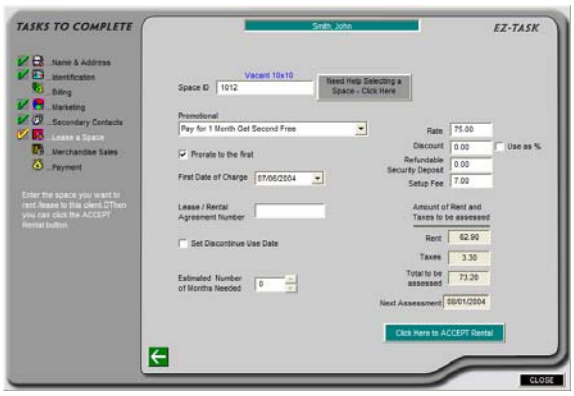
Marketing – Captures general information from customers, which is used to gather advertising and demographic information about the local market. These marketing questions and answers can be customized to your site. Refer to the Demographics and Marketing section.



Secondary Contact – Add a guest that can access the space or a secondary/ emergency contact for the main client. A secondary contact will receive collection letters in addition to the regular client. Emergency contacts will not receive these letters. Click on Add a Guest or Edit a Guest for a pop-up screen that lets you enter or change the guest's information.

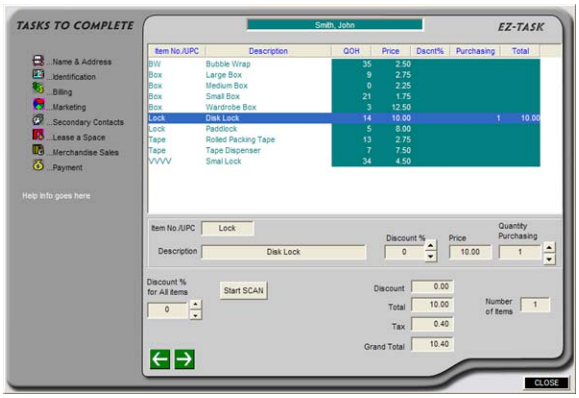


Lease a Space – Contains information about the space that the customer will be renting. To select a space, type in the Space ID or click on **Need Help Selecting a Space** to see a list of vacant spaces. Promotions are discounts that are already in the system and can be changed under Utilities/Site Setup/Promotions in Use.

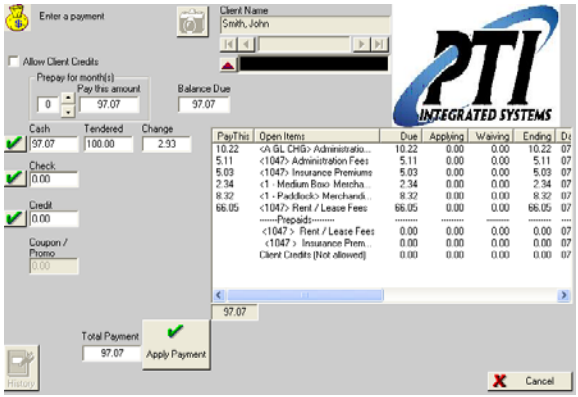


When you have completed this screen, click on **Click Here to Accept Rental**. This will bring up the Insurance Coverage screen, which will allow you to add insurance to the new space.

Merchandise Sales – Enter information here when customers purchase merchandise in addition to renting a space. Merchandise items can be added to the list or edited by going to Utilities/Maintain Merchandise on the Menu bar at the top of the main page. Click on any item to select it. Left-click to add one item. Right-click to subtract one item.



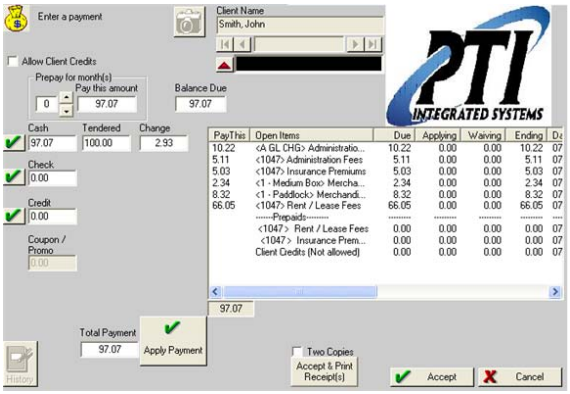
Payment Screen – Lists all charges due and allows the user to take a payment on the selected account. For more information, review the Take A Payment section.



Take a Payment

The **Take a Payment** button on the EZ task screen is used to access the payment screen.

To prepay a customer for a certain number of months use the up arrow to increase the number of months desired. If the customer is prepaying, that prepay amount will be listed under prepays below open items.



The balance due for a customer appears in the **Balance Due** field.

If the customer has multiple spaces, a break down of the total due will be displayed.

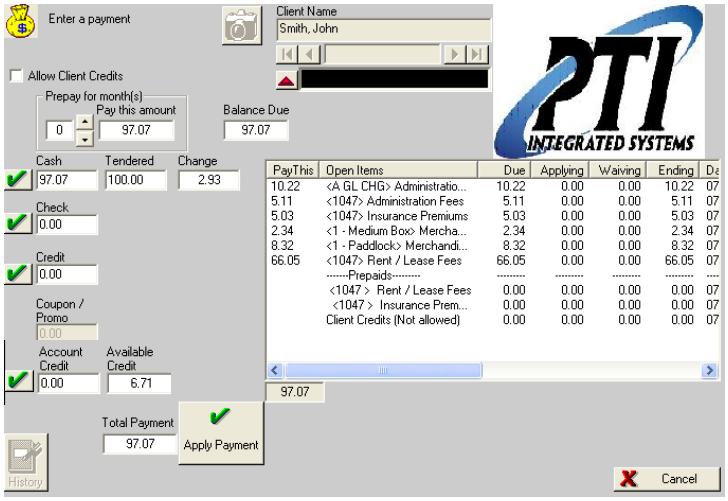
The window in the center of the screen shows a break down of each fee, rental amount, and assessment due.

Clicking on the **History** button shows the record of all payments made by a customer.

To accept a payment, type the amount the client is paying under the Cash, Check, or Credit fields (depending on how they are paying). The Check field requires the check number and bank routing number. The Credit field requires the credit card number and expiration date. A customer can pay a single amount using multiple forms of payment (cash, check, or credit). After entering the amount in the correct fields, click **Apply Payment** . This will bring up the buttons on the right-hand side of the screen allowing you to accept the payment. If you want to print a receipt for the client, click **Accept & Print Receipt(s)**. To accept the payment without printing a receipt, click **Accept**.

If the client has an overlock on the space, then a reminder will pop up letting you know to remove the overlock at this time. This space will also appear on the Overlock Report the next day as a reminder to remove the overlock.

Client Credits

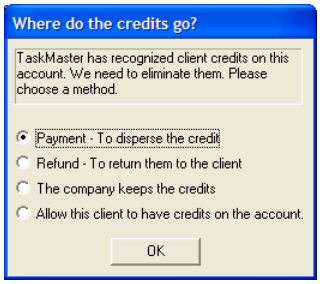


If you take a payment that is more than the monthly rent, but isn't actually prepaying for multiple months, or if you transfer a client from a more expensive space into a less expensive space, you may end up with Client Credits. Merchandise Returns also create client credits.

Client Credits is a function of TaskMaster used to track excess money that would normally be unaccounted for. In many other systems, money must be manually transferred between accounts when a client changes spaces. TaskMaster temporarily holds this money in Client Credits, but you must decide what to do with it. When you exit the payment screen with Client Credits still unused, the credits will remain outstanding in the Account Credit field.

Generally, the system will alert you that there are Client Credits outstanding unless the Allow Client Credits checkbox is checked. The Client Credits will show at the bottom left of the screen in the Available Credit field. You will only see this field if there are client credits on an account. If you click on the Prepay for Month(s) field and select one month, then click twice on the arrow next to the Account Credit, it will apply the Client Credits to future rent.

If you previously left client credits on the Payment Screen, the next time you go to the 123 Accounting Screen, you will see a reminder to disburse the client credits. You can choose to return to the payment screen to take the credits as a payment, to refund the cash to the client, to remove the credits from the client account and allow the company to keep them, or to allow the client to keep the credits on their account.



NOTE: If you allow a client to have Client Credits on their account and you leave money in their Client Credits, it is possible for them to receive a late fee for nonpayment of rent the following month even if there is enough money in client credits to pay their rent. The manager must apply the funds as a payment to prevent this.

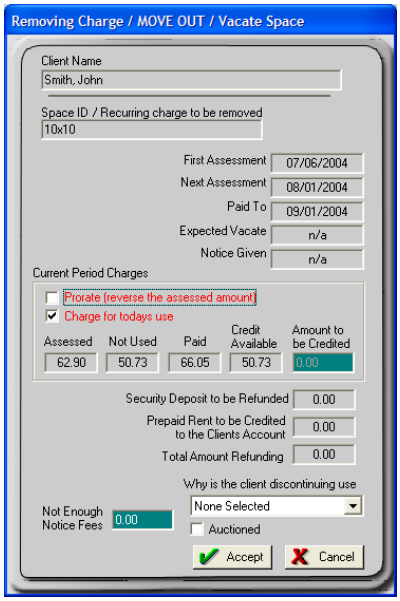
It is possible to set up TaskMaster to accept all overpayments as Client Credits in the Policies Screen of Site Setup. However, we do not recommend this as the manager will have to go into each account every month and manually move the Client Credits to payments.

Vacate Space/Move Out

The **Vacate Space/Move Out** button on EZ Task is used to move a client out of their space and assess any charges or refund any deposits, if applicable.

From the EZ Task Screen, search for the client that you wish to move out. Click **Vacate Space/ Move Out**. The Client Move Out window will pop up. Select which space the client will be moving out of using the drop-down menu. Click on **Click Here for Next Step**.

The **Removing Charge** screen will appear and allows the user to prorate the assessed amount and decide whether or not to charge for the current day's use.

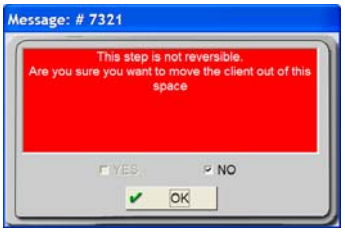


Prorating the assessed amount gives the unused portion of rent back to the customer. To charge the customer for the current day's use, check the appropriate box.

If the facility requires advance notice prior to a client moving out of the facility, there may be a fee showing in the **Not Enough Notice** field. This fee can be altered or removed by changing the amount in the field. To require notice prior to move out, go to Utilities/Site Setup/Policies. The fee (F) is based on the amount of rent (R) divided by the number of days in the current month (D) multiplied by the number of days notice (N) that should have been given (R ÷ D x N = F).

You can also track the reason for the client discontinuing use for marketing purposes by clicking on the **Why is the client discontinuing use** drop-down menu. These answers can be modified in Utilities/Site Setup/Questions & Answers.

Once this screen is complete, click Accept. This will pop up a window asking whether you really want to proceed. Once accepted, the move-out is irreversible. Click on the No checkbox to uncheck it, and then click on the Yes checkbox to place a checkmark in it and click OK to confirm.



Repeat these steps for each space if the client is moving out of multiple spaces at the same time.

Transfer

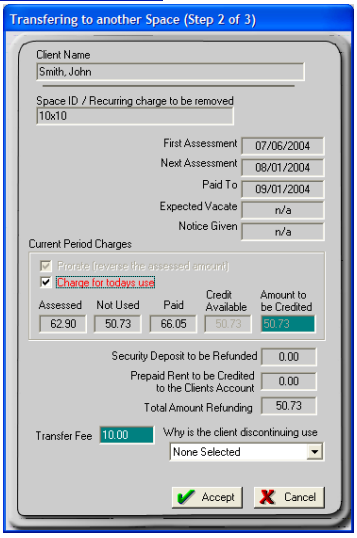
The **Transfer** button on the EZ task screen is used to move a client out of their space and into another one. It will also apply any charges or deposits from the old space to the new space, if applicable. The process is similar to vacating a space.

From the EZ Task Screen search for the client that you wish to transfer. Then click **Transfer**. The Transferring window will pop up. Select which space the client will be transferring out of using the drop-down menu. Click on **Click Here for Next Step**.

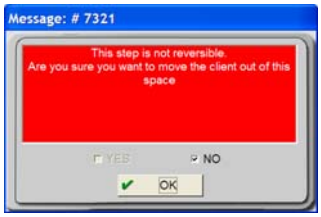
You can choose to charge the client for the current day's use by clicking in the check box next to **Charge for Todays Use**.

If your facility has a fee for transfers, it will appear in the **Transfer Fee** field. You can alter this by typing in the field. To alter the transfer fee or to require one, go to Utilities/Site Setup/Policies.

You can also track the reason for the client discontinuing use for marketing purposes by clicking on the **Why is the client discontinuing use** drop-down menu. These answers can be entered or modified in Utilities/Site Setup/Questions & Answers.



Once this screen is complete, click Accept. This will pop up a window asking whether you really want to proceed. Once accepted, the transfer is irreversible. Click on the No checkbox to uncheck it, and then click on the Yes checkbox to place a checkmark in it and click OK to confirm. A pop-up will appear asking if you want to print a Client Information page. Select the option you want.



The next screen that appears is the **Lease a Space** screen where the new space, rates, and discounts (if applicable) are selected. Select a space to move into as during a new client move in. Complete all required information and click on Click here to Accept Rental. The system will take you to the Payment screen.

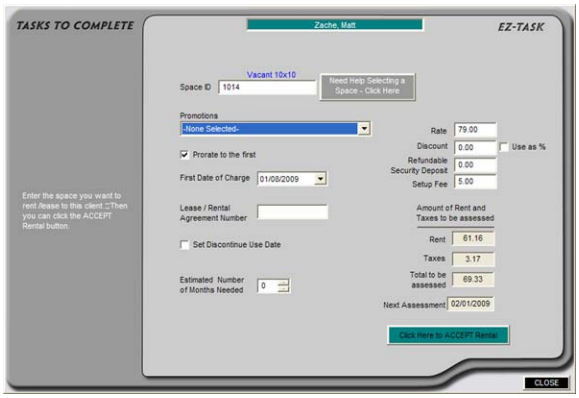
Lease an Additional Space

The **Lease an Additional Space** button on the EZ Task screen is used to add a space to an existing customer's account.

From the EZ Task Screen, search for the client that is renting an additional space. Click **Lease an Additional Space**.

Select the space to rent and adjust any discounts if applicable.

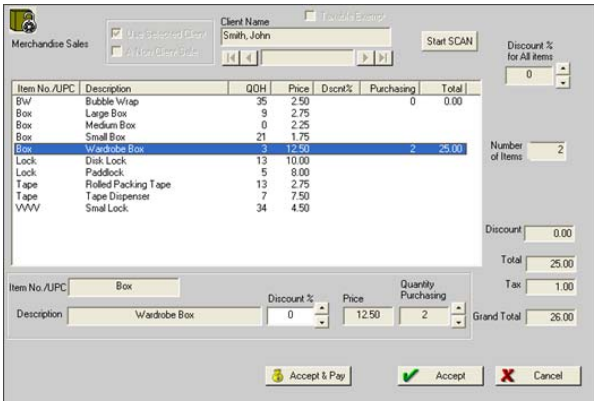
If using the camera module and no picture has been taken yet, take a new picture of the client. The system allows multiple images to be saved for each client.



Click on **Click Here to Accept Rental**. This will bring up the Insurance Coverage screen, which will allow you to add insurance to the new space. Clicking **Add** will apply the space to the account and leave a balance due. Click **Cancel** to cancel the transaction.

Merchandise Sales

The **Merchandise Sales** button on the EZ Task screen is used to sell inventory items such as boxes, tape, and locks.



Choose whether this is a client or a non-client sale. If you are selling the item to an existing client, search for the client name and select their account. Click on **Merchandise Sales**.

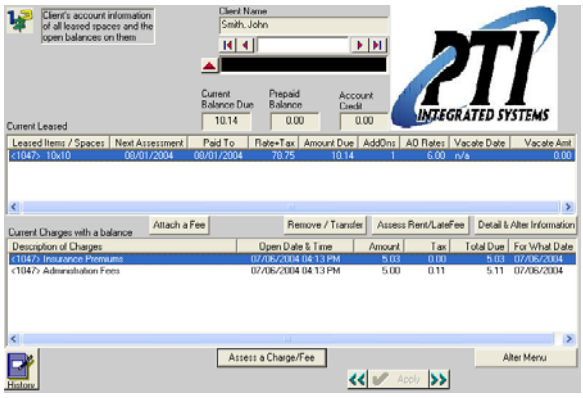
Merchandise items can be added to the list or edited by going to Utilities/Maintain Merchandise on the Menu bar at the top of the main page. See the Maintain Merchandise section.

Click on any item to select it for sale. Double-click the item to add a single item at a time. Double right-click to subtract a single item at a time. When you have finished, click **Accept** to add the item's charge to the client's account or click **Accept & Pay** to go directly to the **Payment** screen. If you have begun a merchandise sale and clicked on Accept & Pay and then need to cancel it for any reason, click **Cancel Merchandise Sale** under **Tasks** on the Menu bar or click **Cancel Sale**.

Account Management

Use the **123 Accounting** button on the EZ Task screen to manage account information for all the spaces that a client is currently leasing along with any current charges or balances. From this screen, you can also access historical account information about a client.

Balances, prepays, and client credits are displayed in the ledger lines across the top below the customer's name.

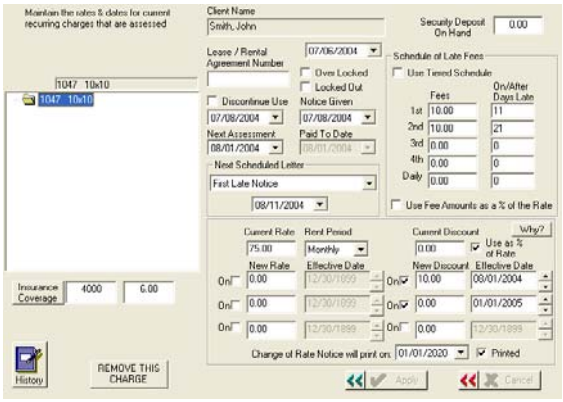


The **Paid To** date for each space is displayed under the **Paid To** column in the **Current Leased** Spaces screen.

The **Remove/Transfer** button will move out the customer or transfer the customer to another space.

Clicking Remove This Charge will start the move out sequence.

Assess a Charge/Fee is basically the same as **Attach a Fee** except that assessing a fee will link the fee to the account rather attaching it to a specific space.



Detail & Alter Information – views the details of the selected space. This screen is for maintaining rates and dates for current recurring charges that are assessed.

The lease/rental number is displayed below the client name and to the right of that are the overlock and lockout check boxes.

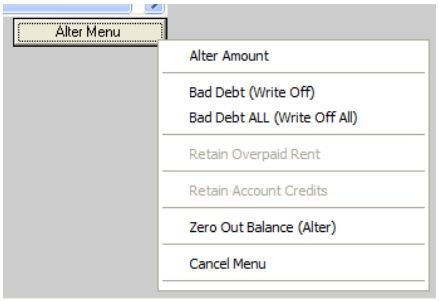
If the lockout is checked and the site interfaces with a gate system, the customer is suspended and will not be able to enter the site.

It is possible to adjust the Next Assessment date up to 30 days forward.

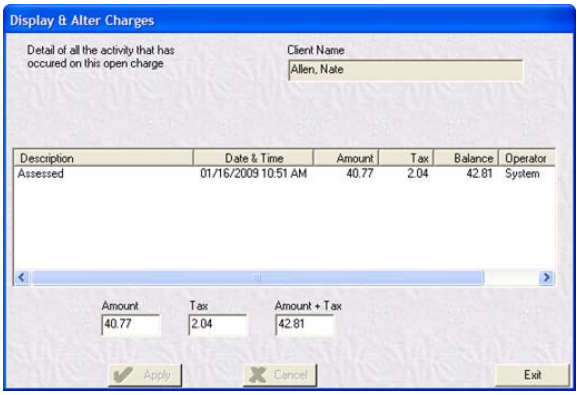
History – All ledger transactions can be reviewed here. The history can also be printed.

Alter Menu

To access the Alter Menu, click on an item in Description of charges and then click on the Alter Menu. The middle of the **Accounting** screen shows the Current Charges with a Balance for the client's account. It provides information on leased spaces and the open balances on them.



To alter the amount, select the charge, click Alter Menu, and select Alter Amount. The Display & Alter Charges window will pop up. Make the necessary changes to the account and click Apply. Click Exit.



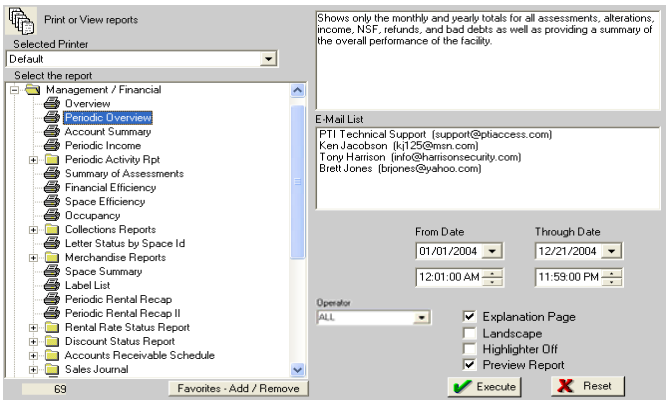
Clicking Retain Overpaid Rent will keep prepaid rent. This setting depends on company policy.

Writing off bad debts can be done one charge at a time by selecting Bad Debt (Write Off) or all charges on the account by selecting Bad Debt (Write-Off All). TaskMaster will query for a reason.

To zero out the balance but not list it as a bad debt, click on Zero Out Balance (Alter).

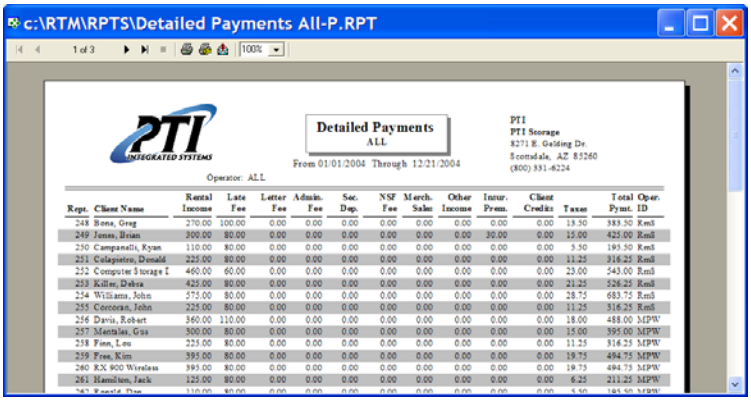
Reports

Use the **Reports** button on EZ Task to manually print out reports. You can add reports to a Favorites folder to keep often-used reports in one place by clicking on **Favorites – Add/Remove**. As you select each report from the menu, a description of the report will appear in the upper right-hand window.



Some reports provide options to narrow the date, time, or operator; print an explanation page, alter the page setup for printing; and highlight sections of the report to make it easier to read. Select those options that you want to customize. Not all reports have all of these options.

To print a report, click **Execute**. If **Preview Report** is checkmarked, the report will appear in a window before printing. You can then print the report by clicking on the **Print** icon at the top of the window. You can also click on the **Export** icon to export the report data to various other formats including Adobe PDF, HTML, Excel, and Lotus 123.

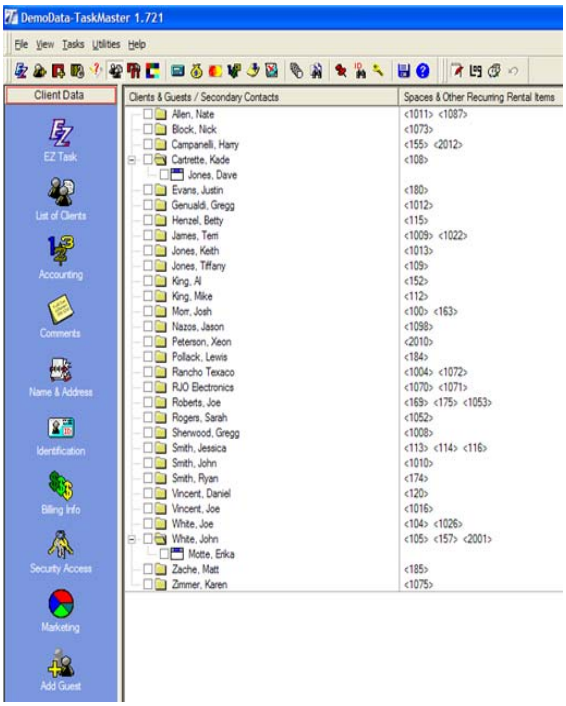


To e-mail a report, click on one or more e-mail address from the E-mail list in the middle of the page. After customizing the report, click **E-mail** to send the report to the selected address(es). You must have the e-mail function set up in advance for this to work. E-mail is set up under Utilities/System Setup. Select the Internet tab.

NOTE: Take the time to print and review each report to become comfortable with the data provided and to help you find the reports that will be most useful to your site. Save these reports to your favorites for future use.

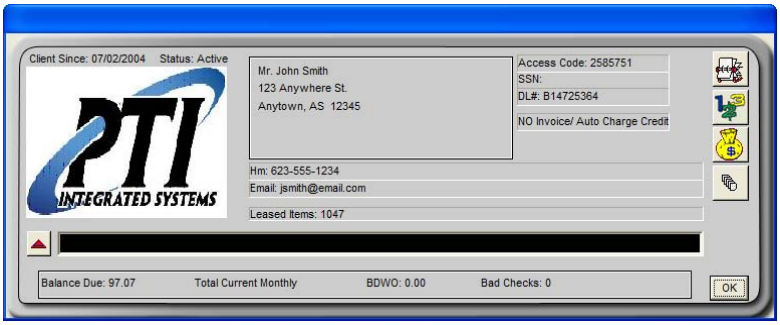
List of Clients

The **List of Clients** button on the EZ Task screen shows all active customers in the database and the spaces that they are renting.



Click on the + sign next to a name to see all guests registered on the account.

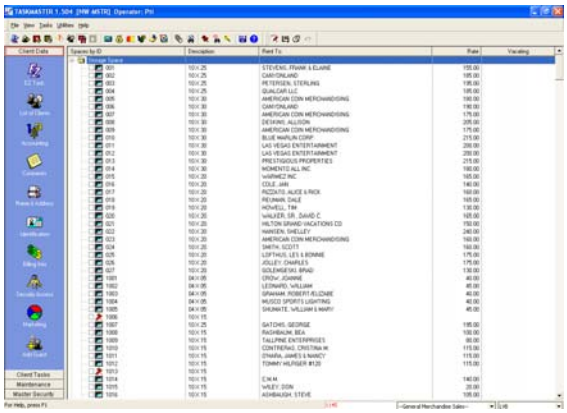
Double-click on a name in the list to open the name & address screen for that person. This screen also appears when the user right-clicks on the client and selects **Edit Client Data**.



To see more information about a client, right-click on a name in the list and select **Show More**. Buttons on the right can be used to quickly move to the name & address, accounting, take a payment, and reports screens. It also gives a brief recap of recent transactions for that particular customer.

List of Spaces

The **List of Spaces** button on the EZ Task shows every space on the property and whether or not it is rented. It also allows some maintenance and status changes to individual spaces.

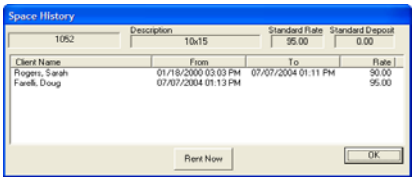


There are two ways to view this screen: in numerical space order or by space size. To change between the two views, go to View/List Spaces by Type.

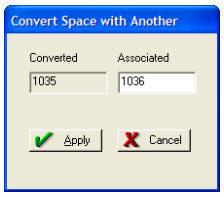
There are functions that can be performed for a specific space by right-clicking the space and selecting from the menu that appears. These are as follows:

Maintenance Log – Tracks when spaces are in need of service and whether the space is rentable or not.

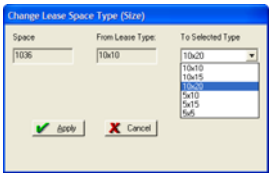
History of Renters – Shows a list of all previous renters for a specific space and the dates they rented. If the space is vacant it can be rented from here by clicking **Rent Now**.



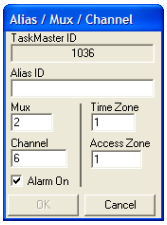
Combine w/Another – Converts two spaces into one larger space. The converted space will no longer be rentable. The **Unconvert** function changes the converted spaces back into individual spaces.



Change Space Size Type – Changes the lease type for converted spaces.



Set Mux & Channel – Sets the mux and channel settings for individual door alarms.



Other Operator Tasks

- **Accessing and Editing Client Data**
- **Comments**
- **Name & Address**
- **Identification**
- **Billing Info**
- **Add a Guest**
- **Documents**
- **Reversing Payments**
- **NSF Checks**
- **Refund Client Credits**
- **Merchandise Returns**
- **Discounts & Promotions**
- **Rate Changes**
- **Insurance**
- **Log In/Log Out**

Accessing and Editing Client Data

There are five screens used to access or edit data on existing clients:
123 Accounting
Comments
Name & Address
Identification
Billing Info.

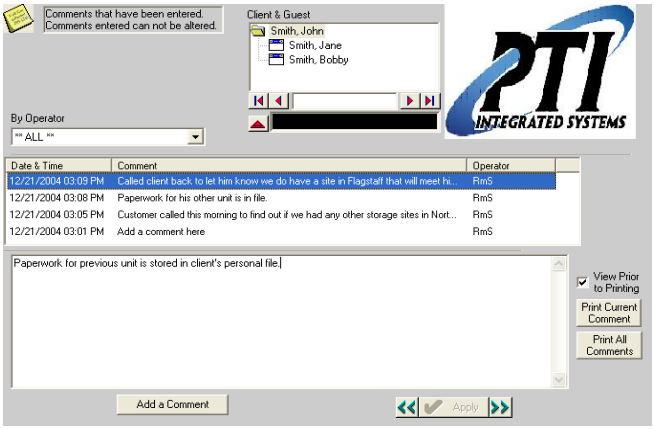
These screens can be found under the Client Data Tab on the Taskbar to the left of the screen. These screens can be selected individually by clicking on the appropriate button on the Taskbar or you can navigate through each screen in order by clicking the forward and backward arrow buttons on each side of the Apply button at the bottom of the screen.

Comments

Enter notes for the client by clicking on **Add a Comment**. TaskMaster will automatically date and time stamp with the user initials for each entry.

You can scroll through the client's entire history in the comment box in the middle of the screen or it can be printed out for review. You can also narrow the comments to those made by a specific operator by changing the **By Operator** drop-down.

NOTE: Once a comment is entered into the customer's file, it cannot be removed.



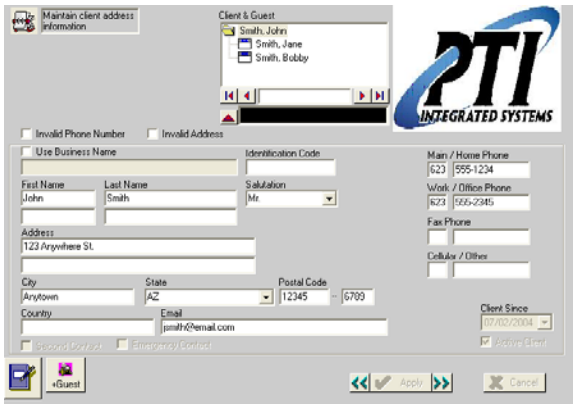
Name & Address

The Name & Address screen is used to update general client information, such as address, phone, client name, and business name.

The **Invalid Phone Number** and **Invalid Address** checkboxes are used to alert the user to update that information the next time the customer comes in to make a payment.

You can switch between client and guest information on this screen by clicking on the appropriate name in the Client & Guest box at the top of the screen. Information on this screen can be changed and updated. All changes are recorded in the history to record what changes have been made and who made them. To review these changes, click History.

Additional Guests can be added by clicking on Add Guest.

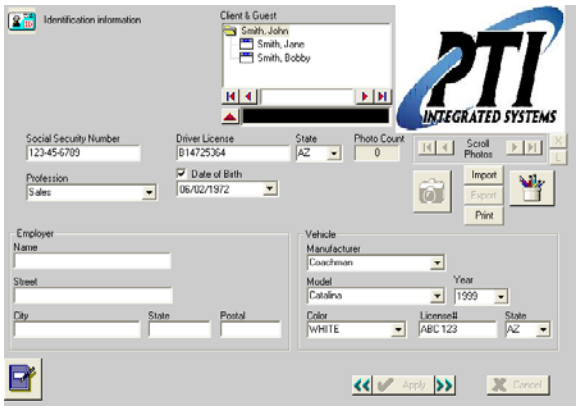


Identification

The Identification screen is used to store Social Security Number, driver license number, date of birth, and vehicle information for the client. You can also manage photos of a client or their guests. Refer to the Photo Module section for more information.

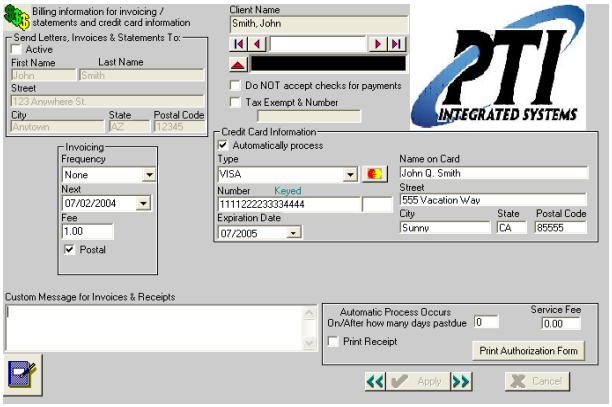
NOTE: The system allows multiple images to be saved for each client. You can scroll through the current and historic photos for a client using the **Scroll Photos** buttons.

If you do not have the photo module, you can still import digital pictures or scans of driver's license/passport photos using the import feature. Pictures must be sized to approximately 320 x 240 pixels at 96 dpi. Refer to your digital camera or scanner user manual for information. To import a picture, click **Import** and locate the picture file stored on the computer.



Billing Info

The Billing Info screen can be used to enter alternate addresses for correspondence. If there is a checkmark in the **Active** checkbox, then all correspondence for this client will print with this address. If the box is not checkmarked, then the main address will be used.



The invoicing section allows you to arrange to automatically send an invoice to a client.

The **Custom Message for Invoices & Receipts** field can be used to print a message on receipts and invoices for this customer alone. Use this if they want purchase order or account numbers on the receipt (or any other specific information).

If you checkmark **Do NOT accept checks for payments**, then the check area on the payment screen will be grayed out. You can use this if a client has paid with an NSF check on multiple occasions.

If you place a checkmark in the **Tax Exempt & Number** field and enter a tax exempt number, then TaskMaster will not charge this client rent taxes. This only applies if rent taxes are set for the property.

If Credit card information is entered on this screen, you can automatically charge a client's credit card for their monthly rent. You will need to set the Automatic Process Occurs field and keep a signed authorization form on file. You can print this form by clicking on **Print Authorization Form**.

Add a Guest

The **Add a Guest** section allows you to add additional users to the account. This is often used to add spouses, business partners/employees, or relatives to an account. Access this function from the Name & Address screen by selecting **Add a Guest**.

Complete all required Guest information. The address information can be prefilled by clicking on **Same as Main User**.

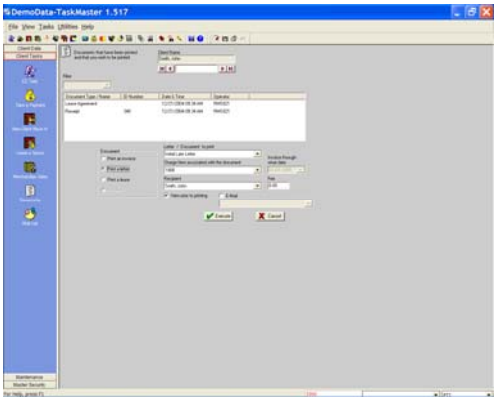
Designating the guest as a secondary contact will cause them to receive any billing or collection letters. Designating them as an emergency contact will prevent them from receiving this information. Leaving both fields blank designates them as a 'true' guest who will not receive billing or collection information and should not be contacted for emergencies.

Once registered, use the **Identification** screen to take a photo of the guest.

Documents

The **Documents** screen allows you to print or reprint documents for a client. Access this screen by clicking on Tasks/Documents.

Click on a previously printed document in the window near the center of the screen and reprint it by selecting **Reprint** from the Document section.



OR

Print an invoice, letter, or lease by clicking the appropriate field.

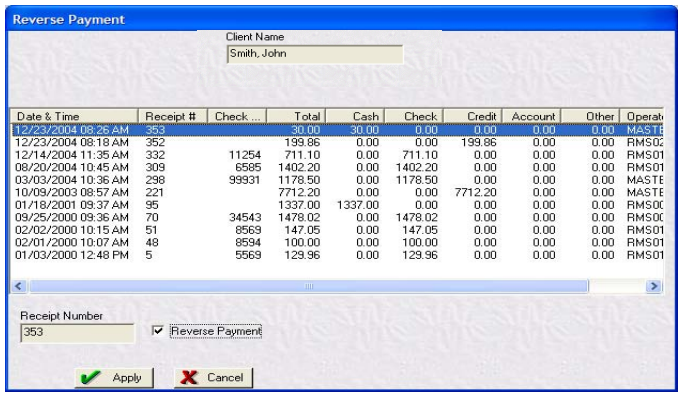
The section next to the document section allows you to customize which letter, invoice, or lease to print. Depending on the document selected, different fields will be activated.

Letters can be e-mailed by placing a checkmark in the **E-mail** checkbox and filling in a valid e-mail address.

Once the information is entered to print or e-mail a document, click **Execute** to print or send the e-mail.

Reversing Payments

The **Reverse Payment** window can be accessed by selecting **Tasks/Reverse A Payment**. This screen can be used to reverse any cash, check, or credit payment that was made within the last 60 days.



You must first search for the client and have their account active before reversing a payment.

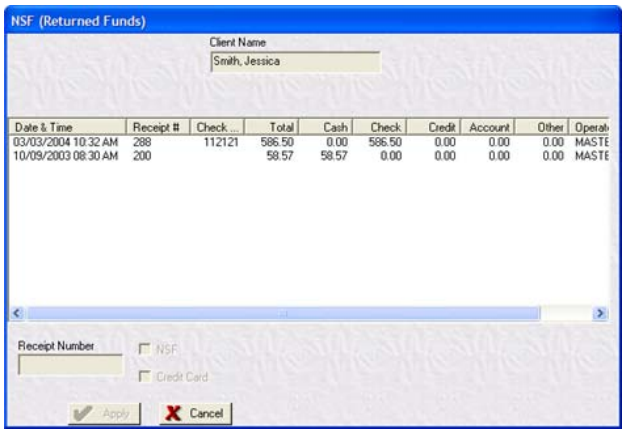
To reverse a payment, select the payment to be reversed and click **Reverse Payment**. Click **Apply** to accept the change. The payment has been reversed.

Reversing credit card payments requires additional steps depending on the status of the payment and batch. Refer to the credit card section for more details.

If you reverse a check or credit card using reverse payments, no NSF fee is charged and the bank deposit amount is reduced.

NSF Checks

The **NSF (Returned Funds)** window can be accessed by selecting **Tasks/NSF (Returned Funds)**. This screen is used to reverse a check payment that has been returned by the bank due to Non-Sufficient Funds (NSF).

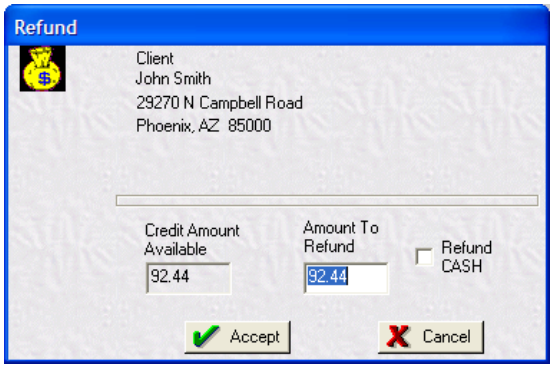


To NSF a check payment, select the payment that you wish to NSF, place a checkmark in the **NSF** checkbox. Click **Apply**. The check is now marked as NSF and the client's account will immediately be marked with any late fees and an NSF fee (if your company charges one).

If you reverse a check or credit card using NSF checks, an NSF fee is charged (if applicable) and the bank deposit amount is not reduced, because the check was already deposited.

Refund Client Credits

Client Credits on a client's account can be refunded to the client by selecting **Tasks/Refund Client Credits**.

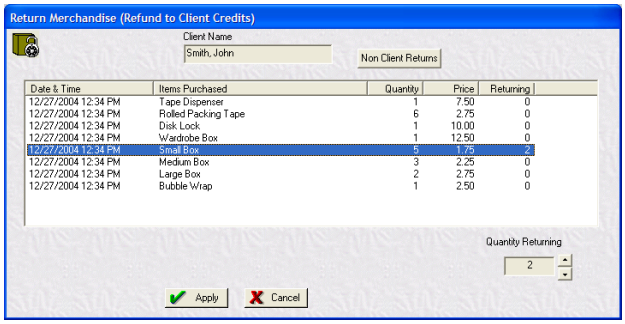


You can elect to refund all or some of the client credits by placing the amount in the **Amount to Refund** field. This field will default to the entire amount of the outstanding Client Credits. Any amount that you do not refund will remain as client credits on the client's account.

Clicking on the **Refund Cash** button removes the full amount from the day's cash receipts and the bank deposit, allowing a direct refund. Leave this box unchecked to print out a voucher that the client can send to the main office for a refund.

Merchandise Returns

Merchandise that has been sold can be returned to inventory and the client's money refunded by selecting **Tasks/Merchandise Returns**.



If merchandise is being returned from a specific client, search for the client in TaskMaster and have their account active before performing the merchandise return. Click on **Tasks/Merchandise Returns**.

To return an item, select it from the list and select the quantity of the item being returned. If more than one type of item is being returned, be sure to select each item on the list and the quantity. Click **Apply** to complete the return. The items will be listed back in the merchandise inventory and the refunded amount will be listed as a Client Credit on the client's account.

If the return was for a non-client, click **Merchandise Sales**. Place a checkmark in the 'non-client sale' checkbox. The Client Name will show General Merchandise Sales as the name. Click on the red pushpin on the toolbar to 'Add Client to List' and return to the EZ Task screen. Select General Merchandise Sales account from the pinned accounts list on the lower right toolbar. The Client Name on the EZ Task screen will change to General Merchandise Sales. Go to **Tasks/Merchandise Returns**.

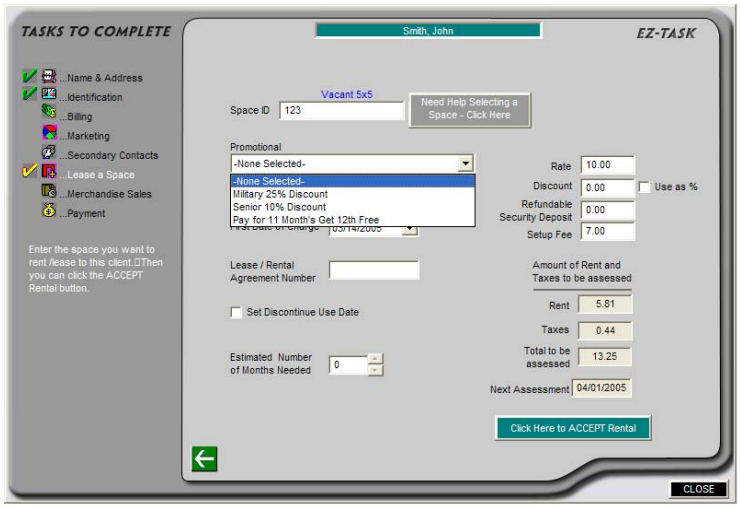
To return an item, select it from the list and select the quantity of the item being returned. If more than one type of item is being returned, be sure to select each item on the list and the quantity. Click **Apply** to complete the return.

The credit will appear on the 123 Accounting screen. Select Refund to the Client. Select the type of refund (cash, check, or credit card) and enter the amount to be refunded.

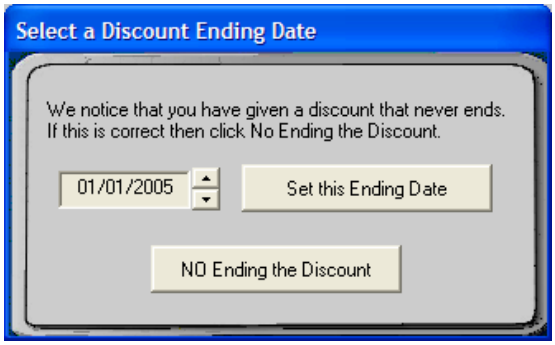
Discounts & Promotions

Giving a discount to a new renter

On the **New Client Move In** wizard, select **Lease a Space/Promotions**. Many of the most common self storage promotions are already preset in TaskMaster. This list must be set up under Promotions in Use. See Promotions in Use for additional instructions.



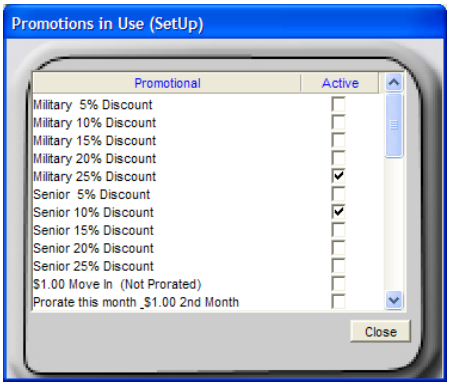
You can also give a discount on the **Lease a Space** screen by entering a discount in the **Discount** field on the right-hand side of the screen, if the required discount isn't included in the Promotions list. A flat dollar discount rate can be given by typing in a dollar amount, or the discount can be a percentage of the space rate by placing a checkmark in the **Use as %** field. If you give a discount in this field, a window will appear when you accept the rental asking you to set an ending date to the discount. If the discount will not expire, click **No Ending the Discount**. To end the discount after a certain date, input the date in the box and click **Set this Ending Date**.



Promotions in Use (Setup)

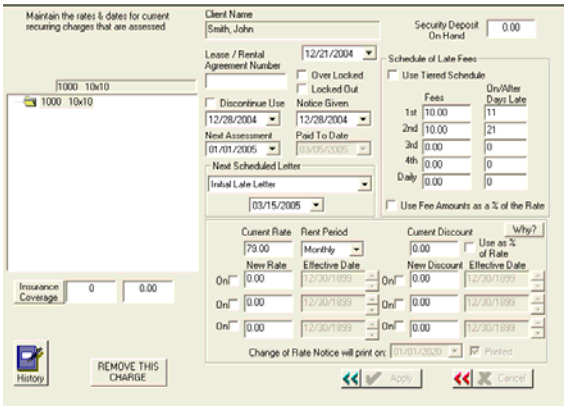
To set the Promotions to appear on the **Lease a Space** screen in the **New Client Move In** wizard, select **Utilities/Site Setup/Promotions in Use**.

Many common self storage discounts and promotions have already been preprogrammed here for your convenience. Place a checkmark beside any promotions the site intends to use. These will appear as options when you rent a new space.



Giving a discount to an existing client on an existing space

To give an existing client a discount on an existing space or on an additional space, go to the **Detail & Alter Information** screen by clicking on **Tasks/123 Accounting**. Select a space and click **Detail & Alter Information**.

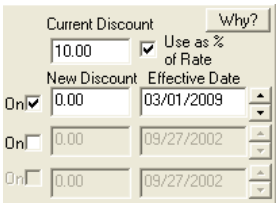


Enter a discount amount in the **Current Discount** Field. If you just type a number in the box, this will be the dollar amount of the discount. If you click on the **Use as %** field then the number will be a percentage of the rental rate for the space.

If the discount is to become effective on the current day, click Apply. If the discount is to begin on a future date, click in the first **On** check box, type an amount under the **New Discount** field and then select an **Effective Date** for the discount to begin. If you type a number under the **New Discount** field, the system will treat it as a dollar amount unless you checkmark the **Use as % of Rate** box.

Give the discount an ending date by clicking in the second **On** checkbox and giving a $0 or 0% discount on the first billing date after the discount ends. **NOTE:** It is important to remember to end discounts. This is the most common mistake that is made when giving a discount. If you do not put an ending date, then the discount will never end. For example, if you give a client a free month of rent after they pay for 12 months, but you do not end the discount, then the client will have free rent forever once they have paid for the first year.

Example A: This client is receiving a 10% discount that begins today and ends on 03/01/09.

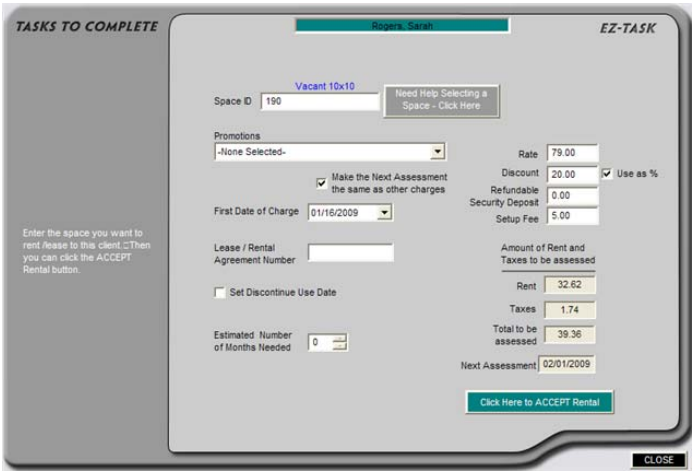


Example B: This client is receiving a 100% discount that begins in the future on 02/01/09 and ends on 03/01/09. Effectively, the client will receive one free month of rent in February 2009.

Example C: This is an example of a stepped discount. This client is receiving $25 off the rental rate for 6 months beginning immediately. Then the discount is $15 off the rental rate for another 6 months, and $5 off for the final 6 months. The rate returns to normal on 03/01/2010.

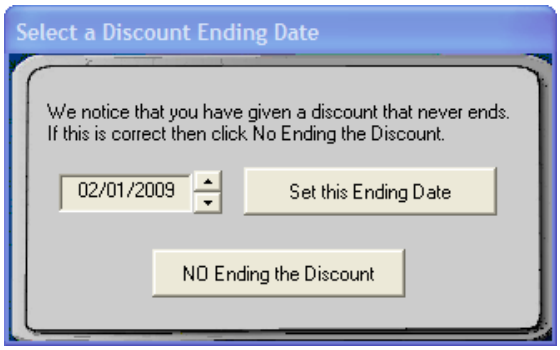
Giving a discount to an existing client renting an additional space

From the EZ Task screen, click **Lease an Additional Space** to give the client a discount when the additional space is rented.



Enter a discount amount in the **Discount** Field. If you just type a number in the box, this will be the dollar amount of the discount. If you click on the **Use as %** field then the number will be a percentage of the rental rate for the space.

Click on **Click Here to Accept Rental**. A pop-up will appear asking you to enter an ending date for the discount. Enter the date on which the discount will end and click **Set this Ending Date**. If the discount will never expire, click **No Ending the Discount**.

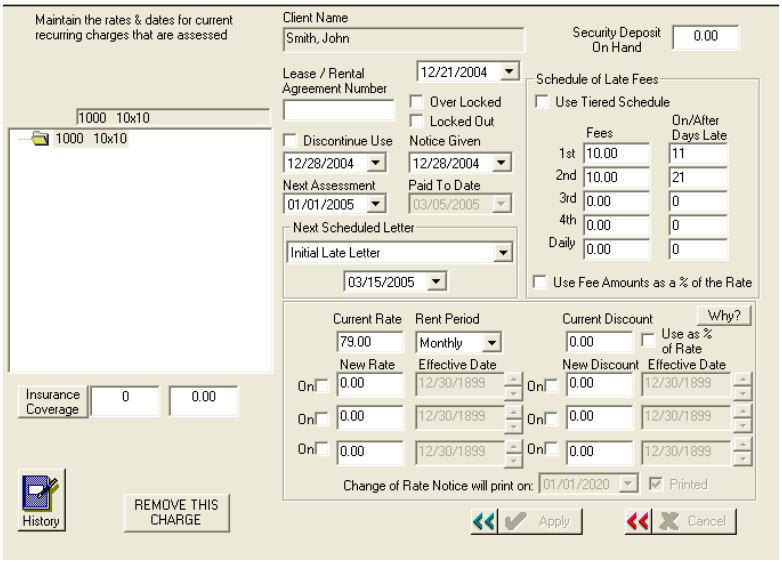


A pop-up will appear asking why the customer is entitled to the discount. Enter a reason and click Accept. The Insurance Coverage screen will pop up. Enter the customer's insurance information and click Add or click Cancel if there is no insurance coverage.

Rate Changes

Rate Change for an existing client on an existing space

To change the rate for an existing client, select **Tasks/123 Accounting**. Click on the space that is to have the rate changed and click **Detail & Alter Information**. Rate Changes are entered in the lower left-hand corner of the screen.



To make a rate change effective on the current day, type a dollar amount in the **Current Rate** Field.

If the rate change is to begin on a future date, click in the first On checkbox, type an amount in the **New Rate** field, then select an **Effective Date** for the rate change to begin.

If you want the rate change to be for a specific period of time, enter an ending date for the rate change by clicking in the next On checkbox and typing in the rate to take effect on the first billing date after the rate change ends. **NOTE:** It is important to remember to end rate changes. This is the most common mistake that is made when making a rate change. If you do not put an ending date, then the rate change will never end.

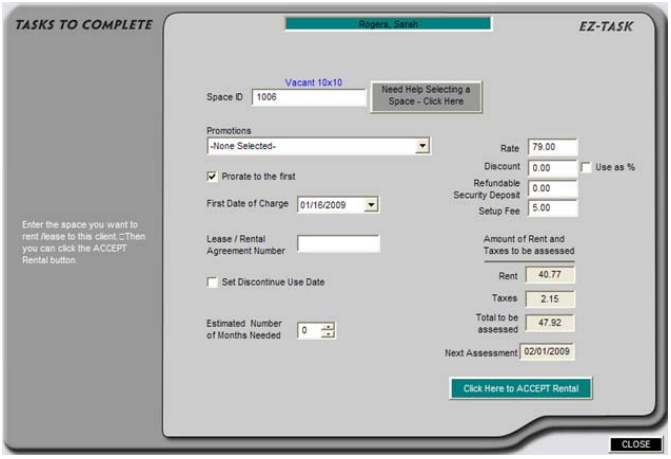
If you give a rate change, the **Change of Rate Notice Will Print On** field will activate. Depending on local regulations, the Change of Rate Notice should be printed and mailed at least 30 days prior to the change in rate. Be sure to set this date to meet with local regulations and site policies.

We do not recommend that you use the Rate Change function to give discounts. Discounts should be given in the discount section so they can be tracked in reports. The Rate Change function should only be changed for special situations where you want an individual automatic rate increase to occur or if the customer negotiated a special price for a time.

Rate Change for an existing client renting an additional space

From the EZ Task screen, select **Lease an Additional Space** to give the client a rate change at the same time as you rent the additional space.

To make a rate change that is effective on the current day, type a dollar amount in the **Rate** Field. This will be the actual rental rate of the space.

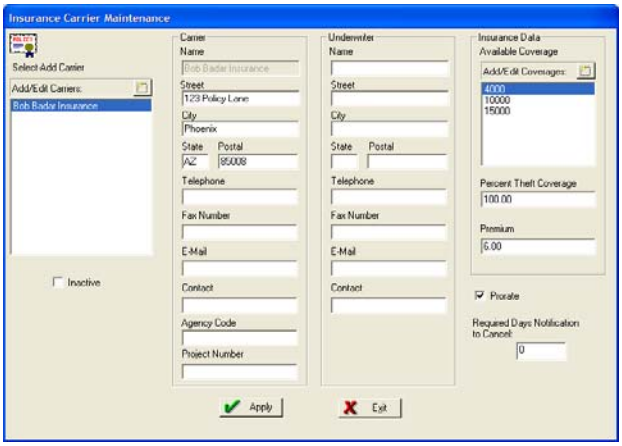


Click on **Click Here to Accept Rental**. A pop-up will appear asking why the customer is entitled to the rate change. Enter a reason and click Accept. The Insurance Coverage screen will pop up. Enter the customer's insurance information and click Add or click Cancel if there is no insurance coverage.

We do not recommend that you use the Rate Change function to give discounts. Discounts should be given in the discount section so they can be tracked in reports. The Rate Change function should only be changed for special situations where you want an individual automatic rate increase to occur or if the customer negotiated a special price for a time.

Insurance

Setting Up Insurance

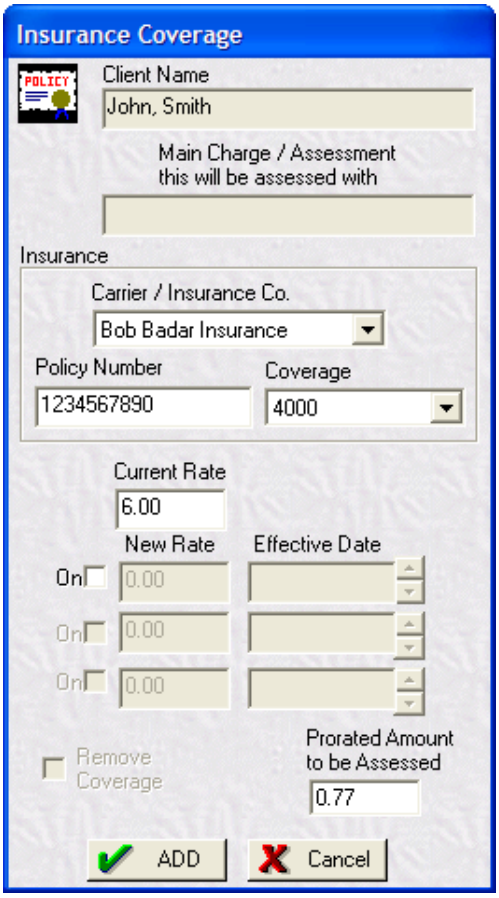


To bring up the Insurance Carrier window go to **Utilities/Maintain Insurance Info**.

Input the insurance carriers that your site uses to sell insurance to your clients. The insurance company will provide you with the information to complete this screen.

You must set up these carriers prior to being able to select them when renting a space.

Selling Insurance to Clients



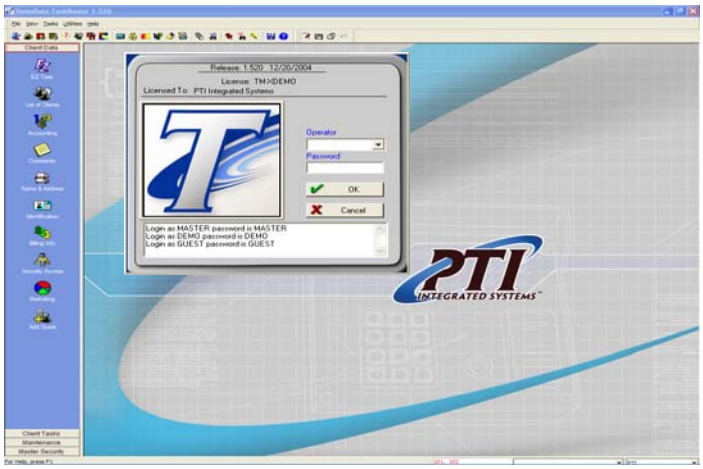
While renting a space to a client through the **New Client Move In** wizard, on the final screen you will be prompted to offer insurance coverage.

If the client declines insurance, click **Cancel**. If the client wishes to purchase insurance, complete the insurance forms provided by the insurance company and complete this screen. You must select a Carrier and input a Policy and Coverage amount for the screen to activate. The Current Rate section allows you to change the rate over time and works like the Rate Change function. When all necessary information has been input, click **Add** to add the insurance to the client's account.

TaskMaster only assesses the insurance premium with the monthly rent. All other communications and paperwork for insurance are handled by the site and the insurance company.

Log In / Log Out

The log in screen appears each time TaskMaster is opened. Enter the Operator ID and Password to begin.



For security purposes, each time you need to leave the computer for any length of time, log out of the program. Click File/Log In / Logout.

There is also a timed log out that can be set so that TaskMaster will automatically log out after a set period of non-use.

To set the automatic logoff, go to **Utilities/System Setup/Operator Setup.** Select the operator Login Name that you want to automatically log off, click Edit Operator Data, and set the number of minutes in the **Automatic Log off After How Many Minutes** field. TaskMaster will automatically log off that user after the number of minutes set in that field. **NOTE:** This feature should be set for every user to maintain an audit trail, preventing one user from making changes under another user's sign on. We recommend that the time be set low for any unrestricted or Level 1 users to prevent more restricted users from accessing restricted functions. Daily users and managers set to level 2 or 3 should be set higher as they will be using the program more frequently throughout the day and it becomes problematic if they have to log in every few minutes.

Possible Settings:

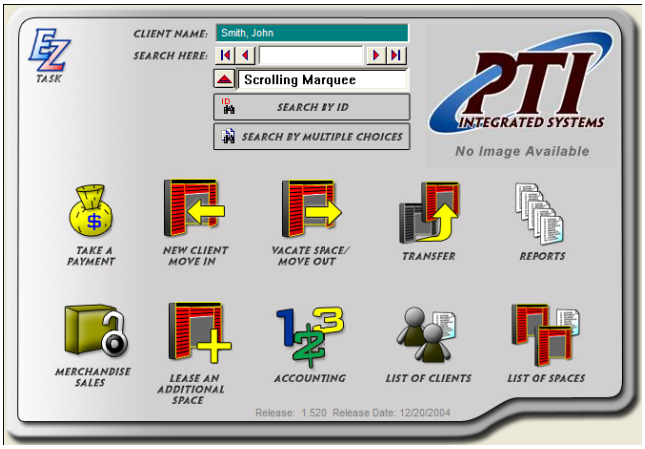
Unrestricted Users:	5 minutes
Level 1 Users:	5 minutes
Level 2 Users:	45 minutes
Level 3 Users:	45 minutes

Operator Tools

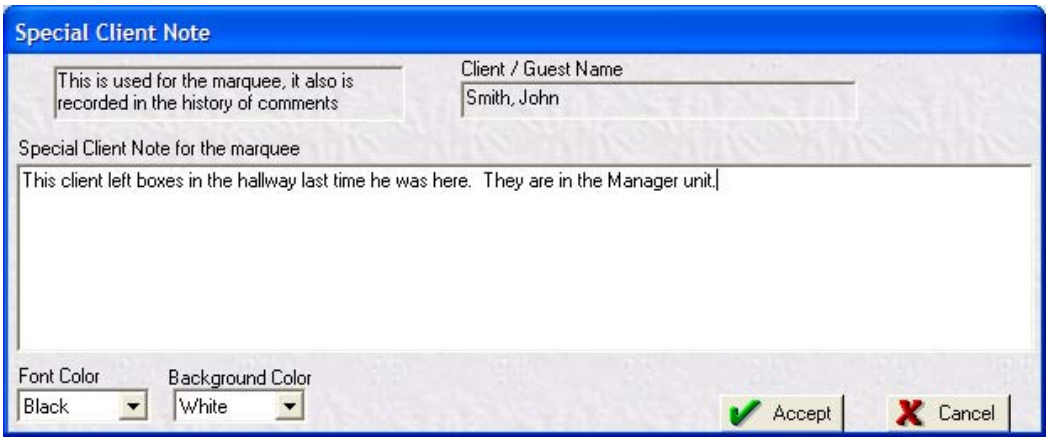
- **Scrolling Marquee**
- **Task Scheduler**
- **Add a Client**
- **Wait List**
- **Rental Inquiries**
- **Add Client to List**
- **Calculator**

Scrolling Marquee

The scrolling marquee tool appears at the top center of most client screens in TaskMaster. It can be used to type a message about a client that will appear whenever you have the client account active in TaskMaster. It can be used for simple reminders to the manager about the client. Notes typed into the Scrolling Marquee are permanently saved in the Notes screen. The Scrolling Marquee can be used over and over again.

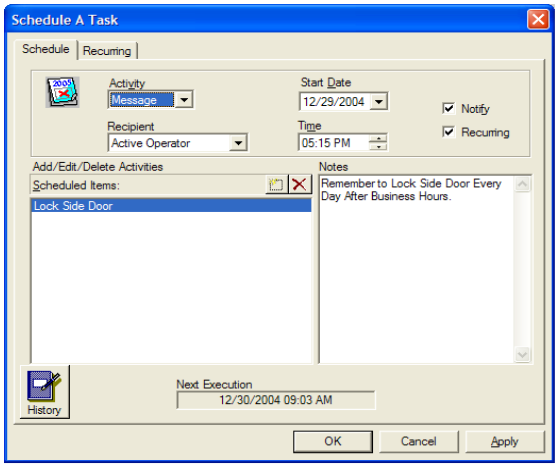


To enter a message into the Scrolling Marquee, click on the button next to the marquee. A window will appear that will allow a note to be typed. The **Font Color** and **Background Color** can also be changed using the drop-down fields.



Task Scheduler

Scheduling a Task



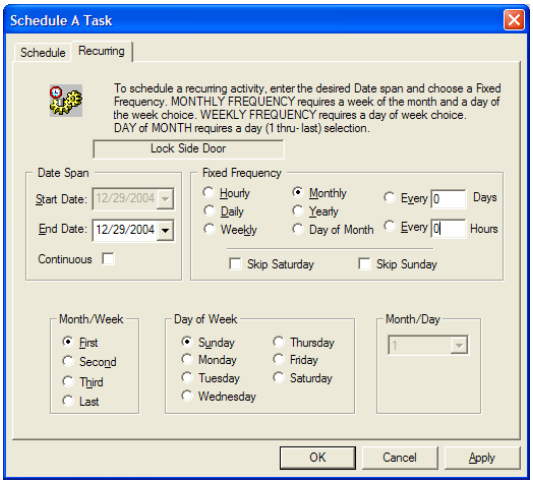
To access this function, select **Utilities/Schedule a Task**.

The Task Scheduler can be used to schedule tasks and activities such as Events, Messages, To-do, Calls, Appointments, and Holidays. A reminder will pop up at the scheduled time. (If you are using Master Security, then you must schedule all holidays in this function.)

To schedule a task, select one of the options under the **Activity** drop-down menu. Select a **Recipient**, **Start Date**, and **Time** for the pop-up message to appear.

NOTE: Do not use Security, E-mail, or Printer Error as these are system functions already set to automatically pop up.

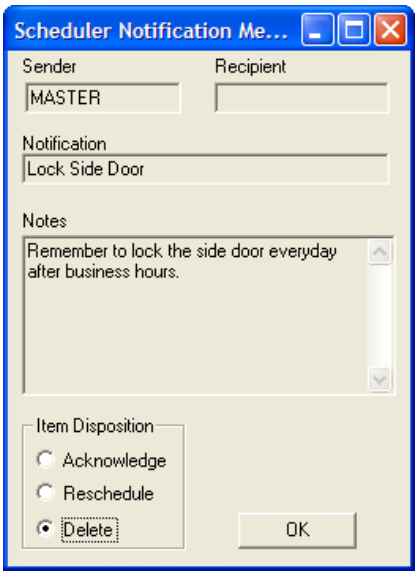
In the **Scheduled Items:** box select **New** and type a title for the message in the box beneath it. Click in the **Notes** field and type a note or reminder to pop up with the message. If you only want the pop-up message to appear one time, leave the **Recurring** checkbox empty and click **Apply**. The message will pop up at the scheduled time. If you have previously scheduled a task and want to delete it, select the item in the box under **Scheduled Items:** and click **Delete**.



NOTE: When the Activity is an Event, a list of events will auto-populate in the Scheduled Items: box. Do not delete or add any items on this list.

To schedule the message to repeat on a regular basis, place a checkmark in the **Recurring** checkbox. This will activate the recurring tab at the top of the window and set the message to occur regularly. Complete the necessary scheduling in the **Recurring** tab, click **Apply**. The message will pop up at the scheduled time.

Task Scheduler Notification Message



A notification message will pop up at the scheduled time. If the message is scheduled for the Active Operator, the message will pop up for whoever is logged on to TaskMaster at the time.

If the message is scheduled for a specific recipient, it will only appear if that user is logged in to TaskMaster at the assigned time. If the assigned recipient is not logged in to TaskMaster at the assigned time for the message to appear, it will appear within a minute of the next time they sign on to the computer.

When a message pops up on the screen, there are three options available: acknowledge the message, reschedule the message, or delete the message.

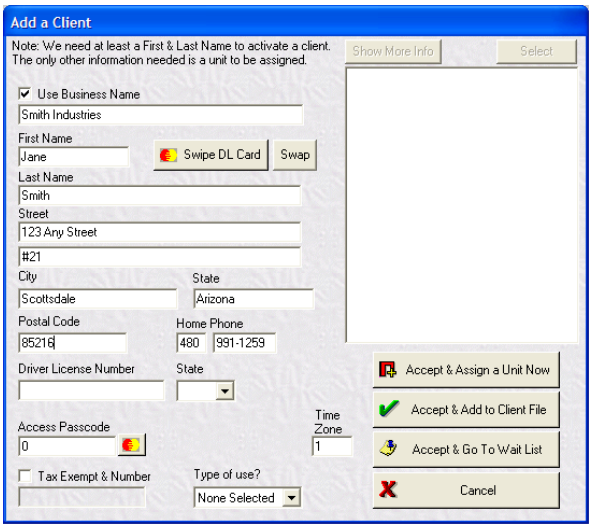
If you click **Acknowledge** and then click **OK**, the message will go away. If it is a recurring message, it will appear again at its next scheduled time.

If you click **Reschedule** and then click **OK**, the message will go away and will reappear one hour later.

If you click **Delete** and then click **OK**, the message will go away. If it is a recurring message, it will NOT reappear at its scheduled time because you have deleted it.

Add a Client

The Add a Client function allows you to quickly add a client to TaskMaster without using the New Client Move-in wizard. Add a Client is generally used during the initial setup of TaskMaster when transferring from paper books to software. It is also used for clients that are to be placed on the waiting list or for clients who purchase merchandise on a regular basis but do not rent spaces.



Select **File/Add a Client**. Fill in the required fields. The only required fields on this page are First Name and Last Name; however, it is a good idea to collect all of the other information.

Once you have completed all necessary information, click on one of the three accept buttons:

Accept & Assign a Space Now takes you to the **Lease a Space** screen. We do not recommend that you use this process as it is more complicated and easier to forget to complete all of the information. We recommend that you close this window when it opens and use the **New Client Move In** wizard from the EZ Task screen.

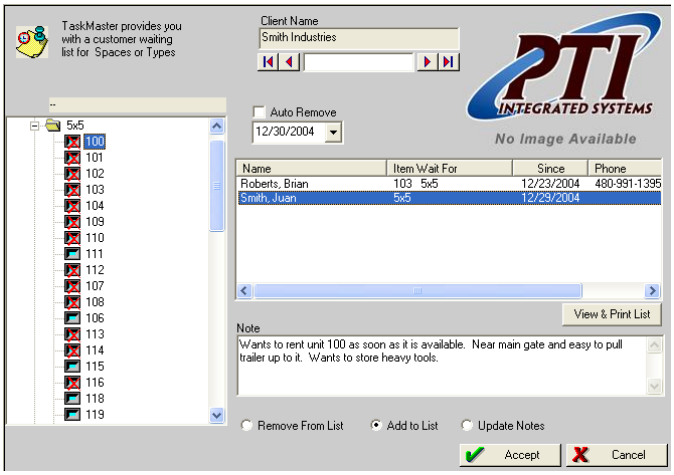
Accept & Add to Client File button takes you directly to the **Name and Address** screen. Use this button only on sites that do not need to do a conversion.

Accept & Go To Wait List is used for clients who are to be added to the **Wait List** but are not currently renting a space. This takes you directly to the **Wait List** screen to reserve a space type for them.

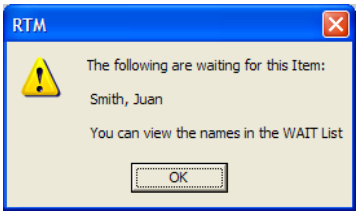
Wait List

The wait list is used to reserve a space or space size for a potential client. This function can be accessed by selecting **Tasks/Wait List**.

The Wait list can be used when a person wants to reserve a space that is available, but they won't be moving in until a later date. It can also be used to reserve a specific space that is already in use by someone else so that the person waiting receives notice as soon as the current renter moves out. Lastly, it can be used to reserve a space size if all of the spaces are rented. As soon as one is available, a notice will pop up that someone is waiting for that size space.

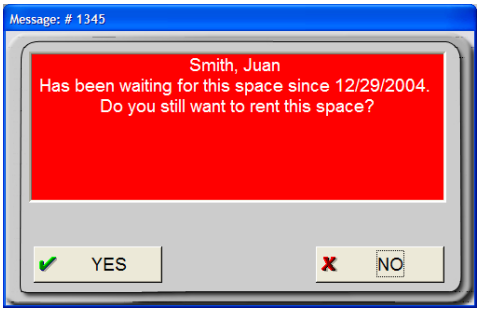


To add someone to the wait list, their account must be open in TaskMaster. If they are a current renter, just search for them. If they are a potential new client, use the **Add a Client** function to enter them into the system so they can be added to the wait list. When you have the client selected, click on the **Wait List** icon. On the Wait List screen, click on a space size in the drop-down or on a specific space to reserve. Click in the **Add to List** button and you will be able to add a note stating the reason they want the space. You can set the wait list to automatically drop the customer off the list on a specific date by clicking on **Auto Remove** and selecting a date. After all information has been entered, click **Accept**.



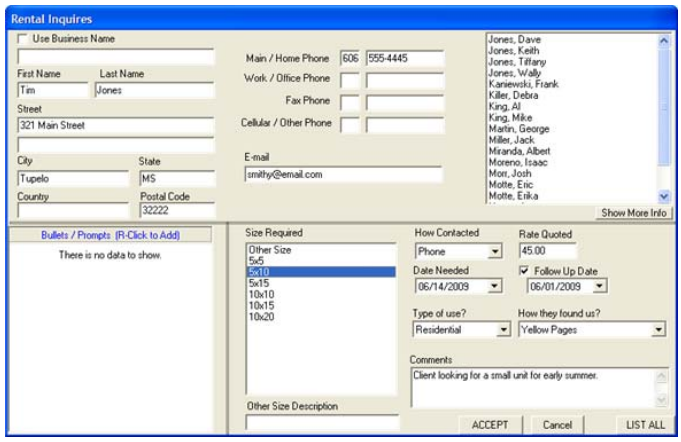
When a renter vacates a space that someone has reserved, a notification will pop up to alert the operator that someone is waiting for the space.

Also, if an operator tries to rent the reserved space to a different person, another notification will pop up to remind them that the space is reserved. The space can still be rented to someone else, if the operator chooses.



Rental Inquiries

The **Rental Inquiries** function can be accessed by selecting **Tasks/Rental Inquiries**. The **Rental Inquiries** function records information on potential clients who are interested in renting but don't want to be put on the waiting list. This function allows the operator to follow up at a later date.



Fill in all required information. Depending on how the site follows up with customers, a full mailing address or simply a phone number will be required so that the customer can be contacted in the future.

In the Size Required box, select the size space the customer wants.

In the How Contacted drop-down, select the method the customer used to contact the site.

Enter the Rate Quoted to the customer for the size space requested.

Enter the Date Needed that the customer provides and the Follow Up Date based on the site's practices.

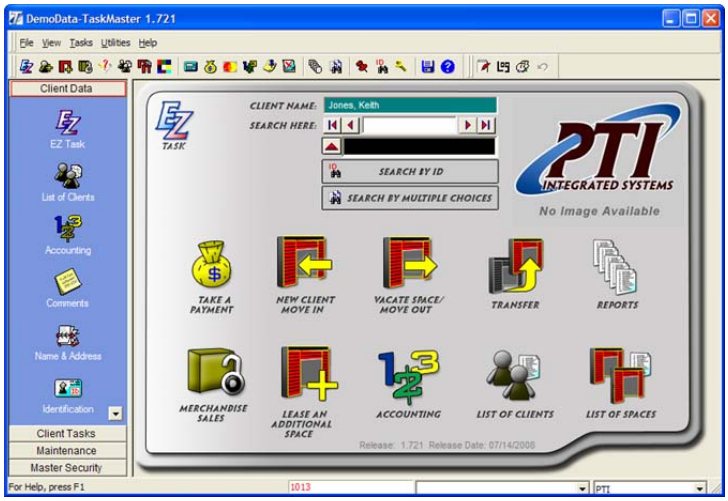
Determine the Type of use the customer intends for the site and enter that in the drop-down. Select the method the customer used to find the site.

In the Comments box, enter any additional information about the customer. Once all information is entered, click Accept.

To see who is on the Rental Inquiries list, click List All.

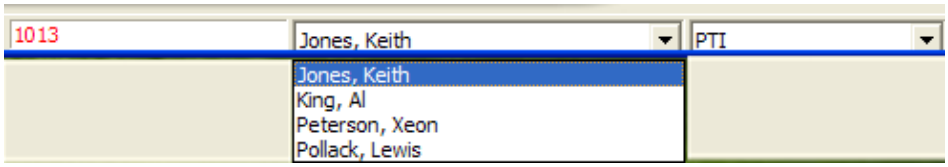
Add Client to List

Add Client to List is used when the operator is in the middle of a process, working on a client's account, etc. and needs to stop what they are doing for a time but return to the same spot later.

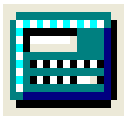


For example, the manager is updating the billing information on Mr. Jones's account. A new client enters to rent a space. The manager can Add the client to a list to save the current information and come back to it after he has helped the client in the office.

To save the account information to come back to later, open the client's account and click on the **Add Client to List** icon on the Toolbar. The account name will appear in the drop-down box along the bottom of the screen. You can now perform any other task in TaskMaster or access any other account. When you are ready to return to the pinned account, click on the drop-down arrow and select the pinned account that you wish to return to. The client's account will reappear on the screen and you can finish the task that you were previously working on.



The account will stay in the list until you remove the pin. To remove the client, select the client and click **Add Client to List**. The client's account will be removed from the drop-down list. There is no limit to the number of accounts that can be added to the list.



Calculator

TaskMaster has a shortcut on the Toolbar to bring up the Windows ® Calculator. To access this function, click on the **Calculator** icon on the toolbar.

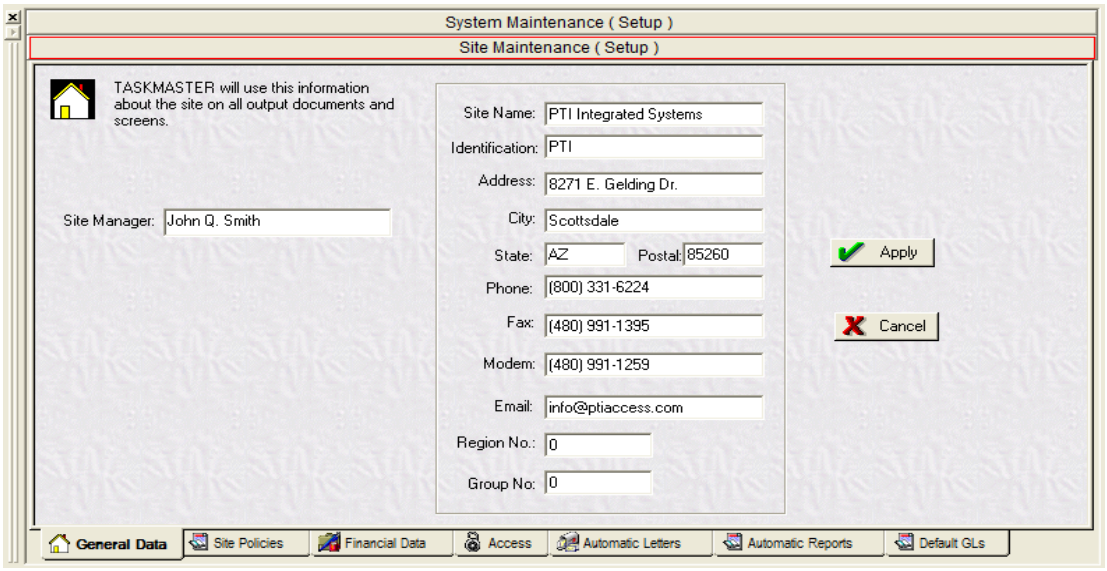
Setup Tools

- System Setup & Site Setup
- System Setup
- Site Setup
- Operator Access Levels
- Setup Lease Spaces
- Tiered Fees
- Document Merge Fields

System Setup & Site Setup

The System Setup and Site Setup screens appear together in TaskMaster. Each screen consists of a group of tabs that can be used to maintain and set up most of the primary functions that are custom to your site. Generally, these screens are already set up as part of the TaskMaster Configuration. **NOTE:** Unless you are a high level user, we do not recommend that you make changes in these screens without assistance from technical support as you can cause problems with the software, corrupt your client data, and even make illegal changes to the collection process.

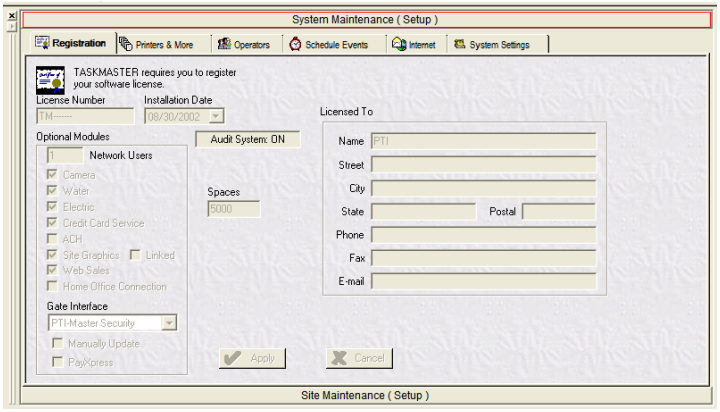
You can navigate between the two sections by clicking on the section's title bar.



System Setup

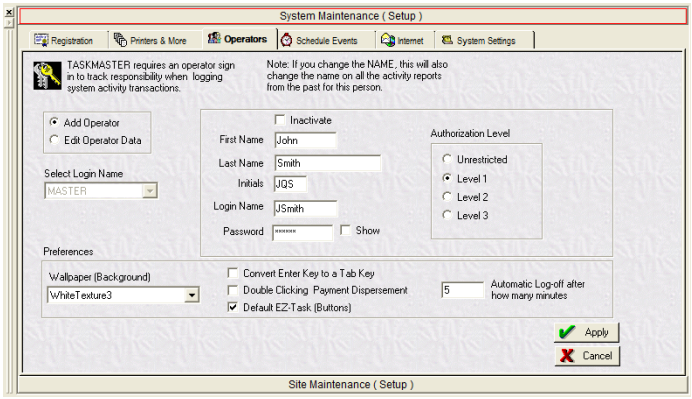
To access **System Setup**, on the Taskbar, expand the **Maintenance Tab** and select **System Setup**.

Registration – The Registration screen is reserved for use by technical support. It shows who the software is licensed to and what modules are functional. If you are ever asked for your TM License Number, it can be found on this screen. This screen can only be modified by technical support.

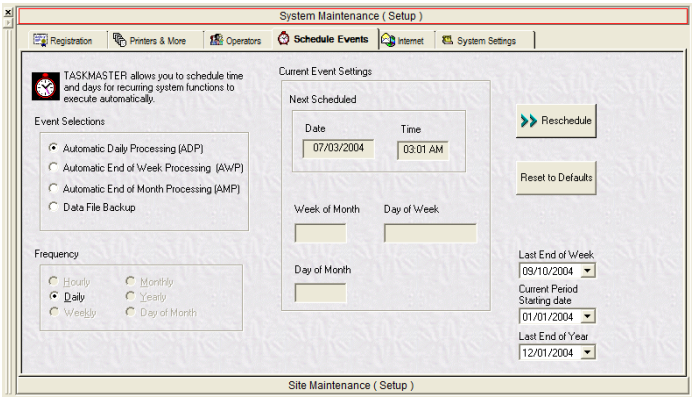


Printers & More – The Printers & More screen contains basic setup parameters including printer setup and ADP (Automatic Daily Processing) setup. The photo source for the photo module also can be set up here.

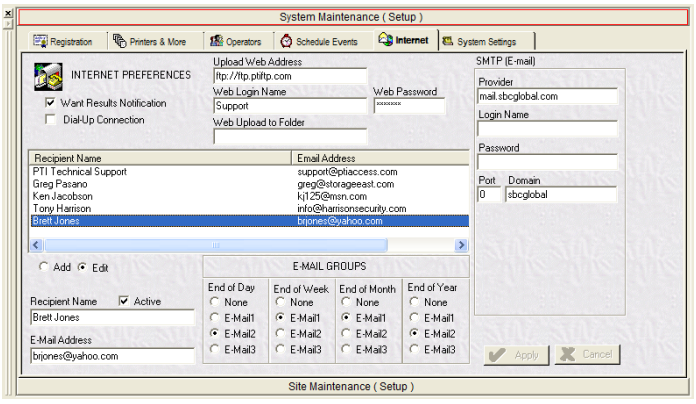
Operators – The Operators tab is used to set up users of the TaskMaster software and their Authorization Levels. **NOTE:** It is a good idea to lock out lower level users from this function. That can be done in **Utilities/Operator Access Levels**.



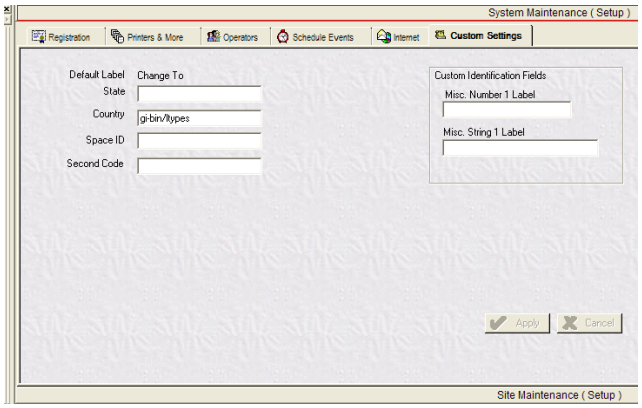
Schedule Events – Scheduled Events is used to set up how often and at what time TaskMaster should perform Automatic Processing and Data File Backups



Internet – The Internet tab contains options used to set up the internet connection for web uploading and e-mail addresses for e-mailing reports.



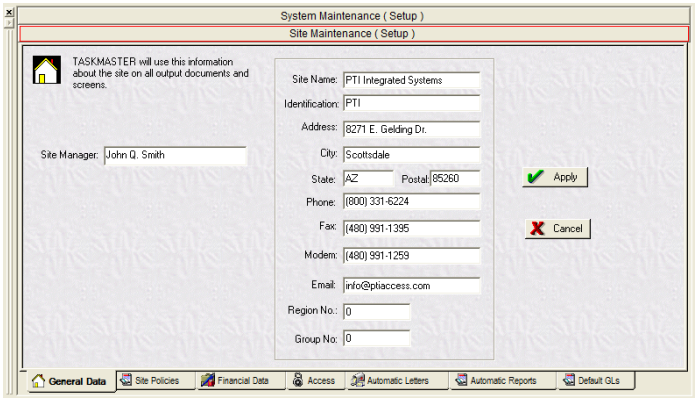
Custom Settings – Custom settings should only be changed by technical support. Do not add or change these settings.



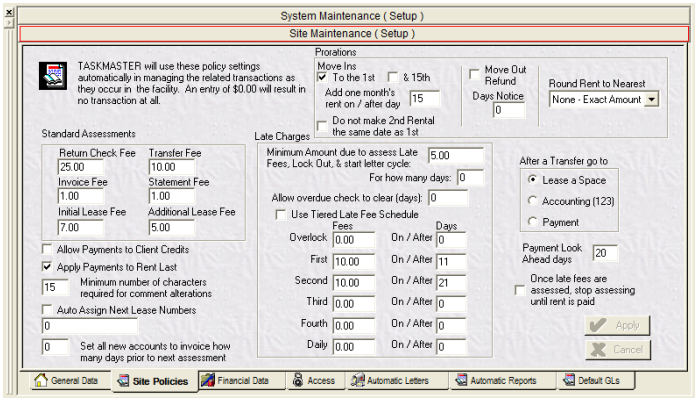
Site Setup

To access **Site Setup**, on the Taskbar, expand the **Maintenance Tab** and select **System Setup**, then select the Site Maintenance (Setup) title bar.

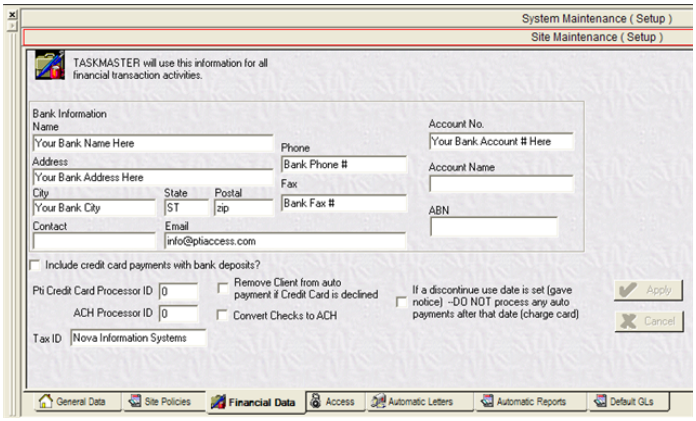
General Data – General Data contains information for the specific location including the name & address information. This information will appear on the top of all correspondence and reports.



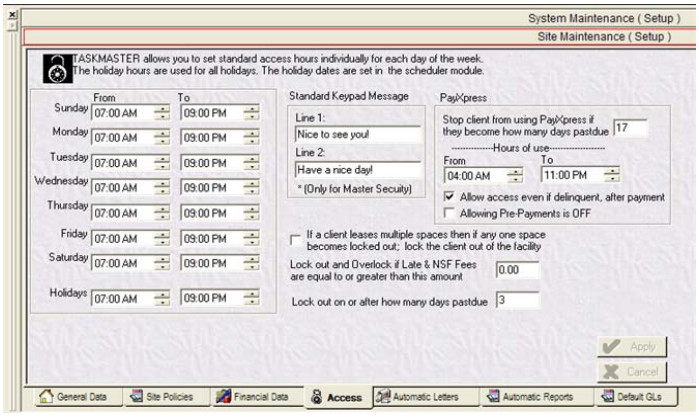
Site Policies – The Site Policies tab tracks the late fee schedule and fee charges, as well as other miscellaneous options. Changes to this page can affect site collection and fee practices, so be sure to have these reviewed by someone familiar with local requirements and statutes.



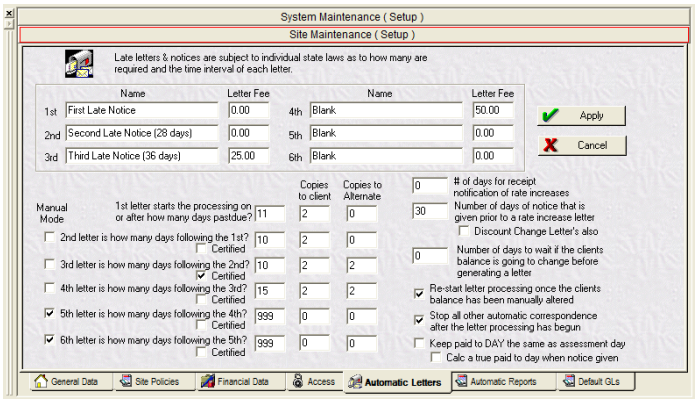
Financial Data – On the Financial Data tab enter the contact info for the credit card processing service and bank information as provided by these institutions.



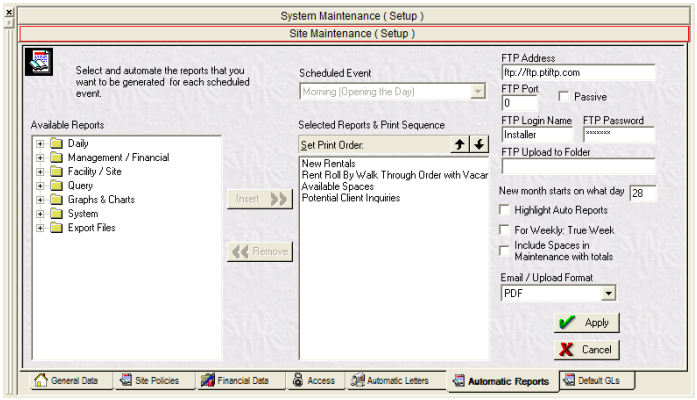
Access – In Access, enter the gate access hours for the facility. (On Master Security systems, this controls when access to the facility is granted. In non-Master Security systems, these are only used for merge fields in letters.)



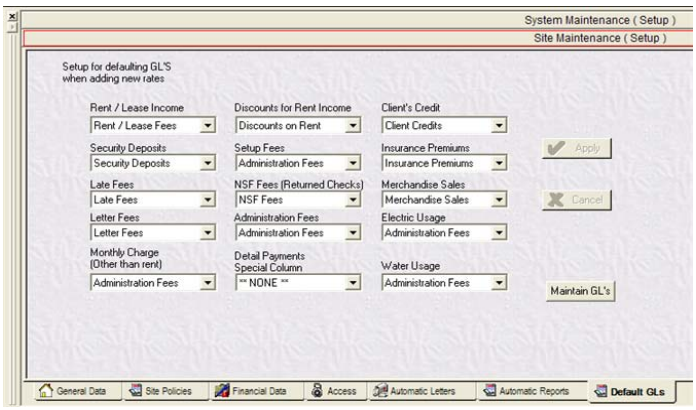
Automatic Letters – In Automatic Letters you can set up when late letters will be printed out and how many copies of each are to be printed.



Automatic Reports – Automatic Reports allows you to choose which reports are to be printed during Automatic Processing and in what order. Also used to set up the FTP information if reports are to be uploaded to an FTP site.



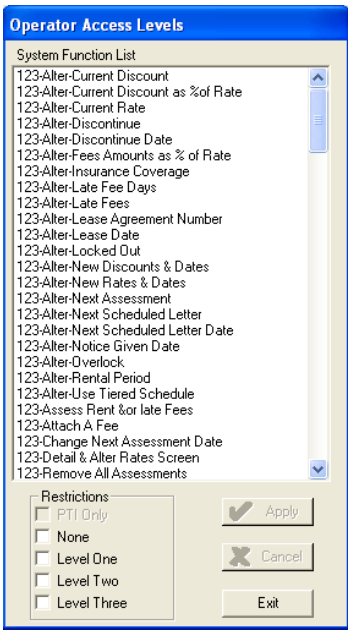
Default General Ledger Accounts – Set up which fees/charges report to which General Ledger account.



Operator Access Levels

To access the **Operator Access Levels** function, select **Utilities/ Operator Access Levels**. TaskMaster offers four levels of security to protect the database and secure sensitive areas of the program. Each level of security is customized by the end user. If each level is not set up, any access level given to an operator will allow free access to all TaskMaster functions.

To customize Operator access levels, open the **Operator Access Levels** screen. Review the list and click on each function that you wish to restrict. In the restrictions box, click on the operator level(s) that you wish to restrict from accessing the function.



Level 3 is the lowest and most restricted access level. Restricting Level 3 means that any Level 3 users will be unable to access the function. Only Levels 1, 2, and Unrestricted will be able to access the function.

Level 2 is less restricted than Level 3. Restricting Level 2 also restricts Level 3. Restricting Level 2 means that any Level 2 and Level 3 users will be unable to access the function. Only Levels 1 and Unrestricted will be able to access the function.

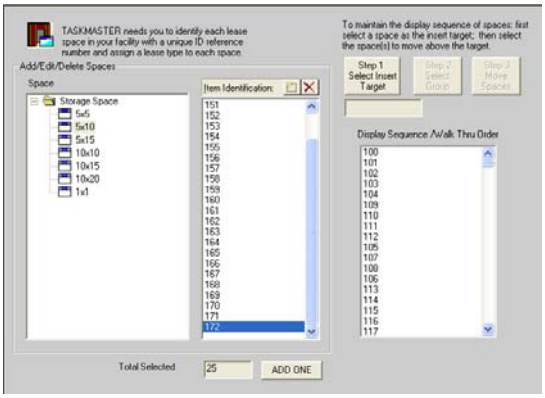
Level 1 is less restricted than Level 2 or Level 3. Restricting Level 1 also restricts Levels 2 and 3. Restricting Level 1 means that any Level 1, Level 2, or Level 3 users will be unable to access the function. Only Unrestricted users will be able to access the function.

None means that the function is completely unrestricted and anyone can access the function.

'PTI Only' means that no user at the site level will be able to access the function including Unrestricted users. Only technical support personnel can access this function and turn the PTI Only designation on or off.

Setup Lease Spaces

Access Setup Lease Spaces by clicking on **Utilities/ Setup Spaces**. This screen is used to add new spaces to the system. Generally, when TaskMaster is purchased, a configuration utility is completed by the site which pre-inputs all of the spaces. In this case, the Setup Spaces screen will not need to be completed. However, should the site add new spaces or reconfigure their existing spaces, this screen is used to add the new spaces. If new sizes/types of spaces (other than those already existing) become available, these will have to be configured under **Maintain Lease Types** prior to setting them up on this screen.

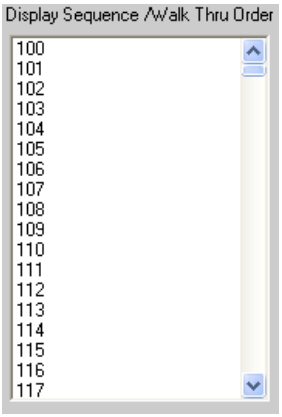


To set up spaces, click on the space size or type in the left-hand window. Click **New (Insert)** above the Item Identification window in the center of the screen. Type the new space number in and press **Enter**. If there are more spaces of that size to be added and they are all consecutive numbers, then click **Add One** for each additional consecutive space. If you make a mistake and need to delete a space, click on the space to delete and then click **Delete**.

NOTE: If the company has exceeded the number of spaces shown on the registration tab, the New/Insert button will not be enabled.

NOTE: Once a space has a history attached to it (i.e. has been assigned a size and/or rented), do not delete if from TaskMaster as this will affect reporting in other areas of the system.

Display Sequence / Walk Through Order



The Setup Spaces screen can be used to change the Walk Through Order for the Walk Through Reports. By moving spaces around in this area, you can change the sequence/order in which the spaces appear on the report, allowing the report to accurately reflect the order that the manager encounters the spaces while performing a walk-through of the site.

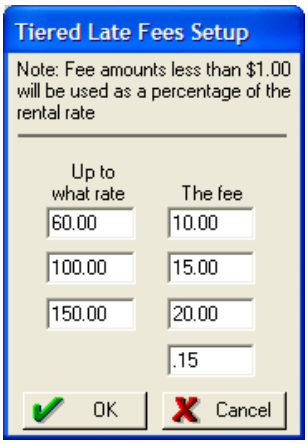
1. To modify the order, click **Step 1**. Then, click on the Target space. This is the space that you will move the other selected spaces in front of.

2. Click **Step 2**. Highlight a single space or group of spaces to be moved above the Target Space. To highlight a single space, just click on it. To highlight a group of spaces consecutively, click and drag over each space. To highlight spaces that are not next to each other, hold down the **Ctrl** key while clicking each space that you wish to select.

3. Click **Step 3** to move the spaces selected in Step 2 in front of the target space. It may take several attempts to get the order exactly right.

Tiered Fees

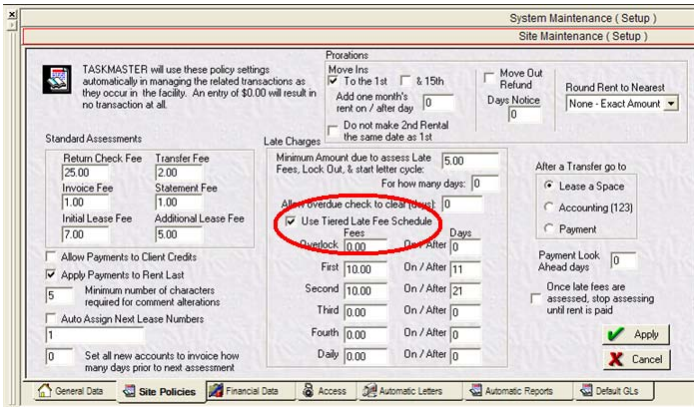
To set Tiered Late fees that change with the rental rate, select **Utilities/Site Setup/Tiered Fees Setup**. Unlike flat rate late fees, tiered late fees will only be assessed one time per month. This allows you to charge higher late fees for more expensive spaces. It also allows you to make the late fee a percentage of the space rental rate.



A site can have up to four tiers of fees. The first three tiers are set by the site and the fourth is for any rental rate above the third tier. Fees can be in fixed dollar amounts by typing in any number greater than 1.00 ($1.00). Any amount from .01 to .99 is considered a percentage of the rate. Dollars and percentages can be mixed through the tiers.

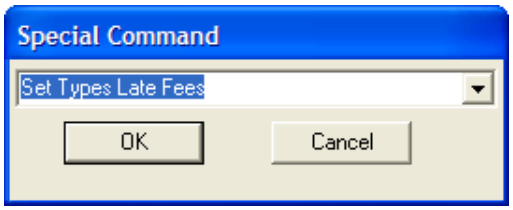
For example, it is common to charge a fixed dollar amount fee for rental rates up to $100; and to charge 15% or $20 (whichever is greater) for rental rates over 100.

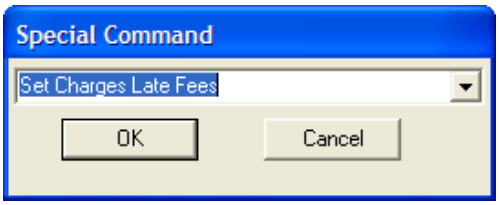
After all Tiered Late Fees are set up, click **OK** to input the fees.



Once the tiered late fees are set up, go to **Utilities/Site Setup/Policies** and place a checkmark in the Use Tiered Late Fee Schedule box.

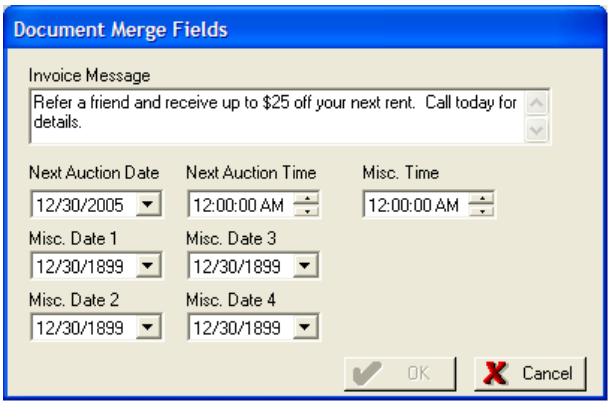
Additionally, a special command must be run to ensure that the tiered late fees are applied to current users as well as new users. To enter a special command, go to **Utilities/ Special Functions/Special Command**. In the box that pops up, type in Set Types Late Fees and click OK. Then type in Set Charges Late Fees and click OK. This will apply the fees to all users and user accounts as applicable.





Document Merge Fields

To change the Document Merge Fields, go to **Utilities/Document Merge Fields**. After all information has been input, click **OK**. These fields can be changed at any time. Document merge fields contain information that can be automatically merged into letters without having to update the letter each time.



There are many Document Merge Fields provided in TaskMaster. Most of the client contact information, dollar amounts and fees, business hours, and dates within the software are Document Merge Fields that appear in various documents. In most cases, these can be found under **Maintain Letters** and inserted into letters from that screen.

There are some Document Merge Fields that apply to every account and need to be changed regularly. This includes custom messages that can appear at the bottom of invoices, the date and time of the next auction, and other miscellaneous dates and time that can be used for anything that the site needs.

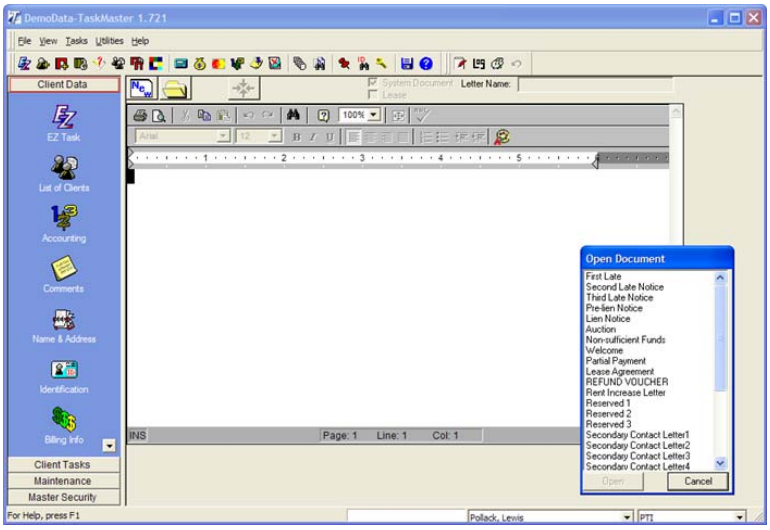
Maintenance Tools

The maintenance tools can be found under Utilities on the Menu bar. These tools are used to maintain and change the most common tasks in Taskmaster.

- **Maintain Letters**
- **Merge Fields for Letters**
- **Maintain Lease Types**
- **Maintain Merchandise**
- **Maintain Insurance Carriers**

Maintain Letters

The Maintain Letters function is accessed by clicking on **Utilities/Maintain Letters**. This is one of the important functions for initial setup of a site in TaskMaster. You should create a set of letters that can be used for your site. A number of sample letters are available in the system already, but it is extremely important that these letters are customized to your site and conform to your local laws and regulations. We strongly recommend that all of your letters be reviewed by a lawyer or other legal resource for legality and regulatory requirements prior to using them at your sites. Chamberlain Access Solutions is not liable or responsible for this process and cannot be held liable if you send out letters that do not conform to legal requirements.



To change letters that already exist (either the default system letters or ones you have created), click on the folder icon and select the letter you want. Changes can then be made to the letter as required in the letter field at the bottom of the window. When you have finished a letter, click **Apply**.

To create a new letter, click **New**. Type a name for the new letter and click Create. Click on the folder icon and select the letter name you just created. Click in the letter field at the bottom of the window. Begin typing the letter in this area. Open the Merge Fields menu (indicated by four arrows turned inward). Any place in the letter that you want the system to automatically insert information such as the client name or the amount owed, place your cursor in the spot and click on the appropriate **Merge Field** from the menu. Click **Insert** to place the merge field in the letter. You can also refer to the Document Merge Fields list on the following pages and simply type the appropriate merge field in the letter.

Letters can also be typed in a word processing program such as Microsoft Word and then copied and pasted into the letter field.

NOTE: Tables, pictures, and graphics will not transfer into the letter. When the letter is completed, click **Save**. Click **Print Preview** to review the letter before sending.

Merge Fields for Letters

Miscellaneous Merge Fields - These Fields are primarily used with Document Merge Fields.

Field Name	Merge Field	Description & Location
Current Date	{Cur.Date}	Current Date as of the letter or document printing.
Current Time	{Cur.Time}	Current Time as of the letter or document printing.
Current Date and Time	{Cur.DT}	Current Date & Time as of the letter or document printing.
Next Auction Date	{Auc.Date}	Next Auction Date as set in the Document Merge Field Utility.
Next Auction Time	{Auc.Time}	Next Auction Time as set in the Document Merge Field Utility.
Miscellaneous Date 1	{Mis.Date1}	Miscellaneous Date 1 as set in the Document Merge Field Utility.
Miscellaneous Date 2	{Mis.Date2}	Miscellaneous Date 2 as set in the Document Merge Field Utility.
Miscellaneous Date 3	{Ms.Date3}	Miscellaneous Date 3 as set in the Document Merge Field Utility.
Miscellaneous Date 4	{Mis.Date4}	Miscellaneous Date 4 as set in the Document Merge Field Utility.
Miscellaneous Time 1	{Mis.Time1}	Miscellaneous Time 1 as set in the Document Merge Field Utility.
Today + 10 Days	{Mis.T+10}	Adds 10 days to the current date in the system in order to give a client 10 days notice.
Today + 15 Days	{Mis.T+15}	Adds 15 days to the current date in the system in order to give a client 15 days notice.
Today + 20 Days	{Mis.T+20}	Adds 20 days to the current date in the system in order to give a client 20 days notice.

Facility Merge Fields - These Data Insert fields are coded only to site/facility specific information.

Field Name	Merge Field	Description & Location
Name	{Fac.Name}	Facility Name. Found on the General Data Tab of the Site Setup.
Street	{Fac.Street}	Facility Street Address. Found on the General Data Tab of the Site Setup.
City	{Fac.City}	Facility City. Found on the General Data Tab of the Site Setup.
State	{Fac.State}	Facility State. Found on the General Data Tab of the Site Setup.
Postal	{Fac.Zip}	Facility Zip Code. Found on the General Data Tab of the Site Setup.
Phone	{Fac.Phone}	Facility Telephone Number. Found on the General Data Tab of the Site Setup.
Fax	{Fac.Fax}	Facility Fax Number. Found on the General Data Tab of the Site Setup.
E-Mail	{Fac.Email}	Facility Email Address. Found on the General Data Tab of the Site Setup.
Identity	{Fac.Id}	Facility Identification. Found on the General Data Tab of the Site Setup.
Manager	{Fac.Mgr}	Site Manager's Name. Found on the General Data Tab of the Site Setup.
Weekday Access Hours From	{Fac.Wafr}	Weekday Gate Access Hours From Time. Found on the Access Tab of the Site Setup.
Weekday Access Hours To	{Fac.Waft}	Weekday Gate Access Hours To Time. Found on the Access Tab of the Site Setup.
Weekend Access Hours From	{Fac.Wefr}	Weekend Gate Access Hours From Time. Found on the Access Tab of the Site Setup.
Weekend Access Hours To	{Fac.Weft}	Weekend Gate Access Hours To Time. Found on the Access Tab of the Site Setup.
Late Letter Fee 1	{Fac.LL1}	Fee assessed on generation of first default letter. Found on the Site Policies Tab of the Site Setup.
Late Letter Fee 2	{Fac.LL2}	Fee assessed on generation of second default letter. Found on the Site Policies Tab of the Site Setup.
Late Letter Fee 3	{Fac.LL3}	Fee assessed on generation of third default letter. Found on the Site Policies Tab of the Site Setup.
Late Letter Fee 4	{Fac.LL4}	Fee assessed on generation of fourth default letter. Found on the Site Policies Tab of the Site Setup.
Late Letter Fee 5	{Fac.LL5}	Fee assessed on generation of fifth default letter. Found on the Site Policies Tab of the Site Setup.
Late Letter Fee 6	{Fac.LL6}	Fee assessed on generation of sixth default letter. Found on the Site Policies Tab of the Site Setup.
NSF Fee	{Fac.Nsf}	Fee assessed during the processing of an NSF check. Found on the Site Policies Tab of the Site Setup.
Overlock Fee	{Fac.Olf}	Fee assessed for processing Overlock. Found on the Site Policies Tab of the Site Setup.

Client Merge Fields - The Data Insert Fields are coded only to client specific information.

Field Name	Merge Field	Description & Location
Business Name	{Clnt.Bname}	Client's Business Name. Found on the Name & Address Screen.
Salutation	{Clnt.Sal}	Client's Salutation. Found on the Name & Address Screen.
First Name	{Clnt.Fname}	Client's First Name. Found on the Name & Address Screen.
Last Name	{Clnt.Lname}	Client's Last Name. Found on the Name & Address Screen.
Street Line 1	{Clnt.Str1}	Client's Street Address Line 1. Found on the Name & Address Screen.
Street Line 2	{Clnt.Str2}	Client's Street Address Line 2. Found on the Name & Address Screen.
City	{Clnt.City}	Client's City. Found on the Name & Address Screen.
State	{Clnt.State}	Client's State. Found on the Name & Address Screen.
Postal Code	{Clnt.Zip}	Client's Zip Code. Found on the Name & Address Screen.
Postal-Ext	{Clnt.ZipExt}	Client's Zip Code Extension. Found on the Name & Address Screen.
Country	{Clnt.Ctry}	Client's Country. Found on the Name & Address Screen.
Name / Address, Line 1	{Clnt.NA1}	First line used in addressing the client on invoices, letters & Receipts. Will be the Business Name if there is one. If not, this will be the Client's first and last name.
Name / Address, Line 2	{Clnt.NA2}	Second line used in addressing the client on invoices, letters & Receipts. If there is a Business Name in Line 1, this will be the Client's Name. If the Client's Name is in Line 1, this will be the first line of the street address.
Name / Address, Line 3	{Clnt.NA3}	Third line used in addressing the client on invoices, letters & Receipts. If the Client's Name is in Line 2, this will be the first line of the street address. If the first line of the Street address is in Line 2, then this will be the Second line of the Street Address. If there is no second line of the Street Address and if the first line of the Street Address is in Line 2, this will be the City, State, and Zip Code.
Name / Address, Line 4	{Clnt.NA4}	Fourth line used in addressing the client on invoices, letters & Receipts. If the City, State, and Zip Code are in Line 3, Nothing will be in this line. If the first line of the street address is in Line 3, then this will be the second line of the street address. If the first line of the street address is in Line 3 and there is no second line of the street address, then this will be the city state and zip code.
Name / Address, Line 5	{Clnt.NA5}	Fifth line used in addressing the client on invoices, letters & Receipts. If there is no line 4, then there will be no line 5. If the second line of the street address is in line 4, then the city, state, and zip code will be in this line.
Home Phone	{Clnt.Hphone}	Client's Home Phone Number. Found on the Name & Address Screen.
Work Phone	{Clnt.Wphone}	Client's Work Phone Number. Found on the Name & Address Screen.
EMail	{Clnt.Email}	Client's Email. Found on the Name & Address Screen.
Identity	{Clnt.Id}	Client's Identification Number. Found on the Name & Address Screen (if applicable).
Drivers License	{Clnt.DL}	Client's Drivers License Number. Found on the Identification Screen.
Social Security #	{Clnt.SS}	Client's Social Security Number. Found on the Social Security Screen.
Employer	{Clnt.Emp}	Client's Employer's Name. Found on the Identification Screen.
Profession	{Clnt.Pro}	Client's Profession. Found on the Identification Screen.
Date of Birth	{Clnt.DOB}	Client's Date of Birth. Found on the Identification Screen.
Last NSF Check	{Clnt.LNC}	Last Check returned for Non-Sufficient Funds. Found on the Payment Screen History.
Total Due	{Clnt.TD}	Total amount of all charges due on a clients account. Found on the Payment Screen.
Late Fees Due	{Clnt.LD}	Total amount of late fees for all Lease Items due on a client's account. Found on the Payment Screen. Found on the Payment Screen.
NSF Fees Due	{Clnt.ND}	Total amount of NSF fees due on a client's account. Found on the Payment Screen.
Total Fees Due	{Clnt.FD}	Total amount of all late, letter and NSF fees due on a client's account. Found on the Payment Screen.
Client Credits	{Clnt.AC}	Total amount of Client Credits that are credited to a client's account. Found on the Payment Screen.
Last Payment Amount	{Clnt.LP}	Amount of last payment made by client. Found on the Payment Screen History.
Last Receipt Number	{Clnt.LRN}	Last Receipt Number. Found on the Payment Screen History.
Secondary Salutation	{Clnt.2Sal}	Secondary Contact Salutation. Found on the Guest Name & Address Screen.
Secondary First Name	{Clnt.2Fname}	Secondary Contact First Name. Found on the Guest Name & Address Screen.
Secondary Last Name	{Clnt.2Lname}	Secondary Contact Last Name. Found on the Guest Name & Address Screen.
Secondary Street, Line 1	{Clnt.2Str1}	Secondary Contact Street Address Line 1. Found on Guest Name & Address Screen.
Secondary Street, Line 2	{Clnt.2Str2}	Secondary Contact Street Address Line 2. Found on Guest Name & Address Screen.

Secondary City	{Clnt.2City}	Secondary Contact City. Found on the Guest Name & Address Screen.
Secondary State	{Clnt.2State}	Secondary Contact State. Found on the Guest Name & Address Screen.
Secondary Postal	{Clnt.2Zip}	Secondary Contact Zip Code. Found on the Guest Name & Address Screen.
Secondary Postal-Ext	{Clnt.2ZipExt}	Secondary Contact Zip Code Extension. Found on the Guest Name & Address Screen.
Secondary Country	{Clnt.Ctry}	Secondary Contact Country. Found on the Guest Name & Address Screen.
Secondary Home Phone	{Clnt.2Hphone}	Secondary Contact Home Telephone Number. Found on the Guest Name & Address Screen.
Secondary Work Phone	{Clnt.2Wphone}	Secondary Contact Work Telephone Number. Found on the Guest Name & Address Screen.
Secondary EMail	{Clnt.2Email}	Secondary Contact Email Address. Found on the Guest Name & Address Screen.
Secondary Access Code	{Clnt.2Acode}	Secondary Contact Access Code. Found on the Guest Security & Access Screen.
Access Code	{Clnt.Acode}	Client's Gate Access Code. Found on the Guest Security & Access Screen.
Last Refunded Amount	{Clnt.Ramt}	Most recent refund for any space leased to a client. Found on 123 Accounting Screen History.
List Space ID's	{Clnt.Iids}	Listing of all Lease Items in a client's account (all spaces and other leased items the client is renting). Found on the 123 Accounting Screen.
Last NSF Check Amount	{Clnt.LNCa}	Amount of Last NSF on any space leased to a client. Found on the Payment Screen History.
Merchandise Sales Due	{Clnt.Msd}	Total amount due for merchandise in a client's account. Found on the Payment Screen.
Merchandise Sales Tax Due	{Clnt.Mstd}	Amount of tax owed for all merchandise in a client's account. Found on the Payment Screen.
Merch Sales + Tax Due	{Clnt.Mtot}	Total amount of merchandise due plus tax in a client's account. Found on the Payment Screen.
Last Payment Date	{Clnt.Lpdt}	Date the Client last made a payment on any space leased to the client or on any merchandise purchase. Found on the Payment Screen History.
Total Mo. Rent Rate	{Clnt.Tmrr}	Total monthly rent rate for client for all spaces leased to a client for a normal month. Found on the Detail & Alter Information Screen.
Total Mo. Discounts	{Clnt.Tmdc}	Total monthly rent rate discount for all spaces leased to a client for a normal month. Found on the Detail & Alter Information Screen.
Total Mo. Tax	{Clnt.Tmtx}	Total monthly rent rate for all spaces leased to a client for a normal month. Found on the 123 Accounting Screen.
Total Mo. R – D	{Clnt.Tmrd}	Total monthly rent rate for all spaces leased to a client for a normal month minus the discount. Found on the 123 Accounting Screen.
Total Mo. R – D + Tx	{Clnt.Tmrdt}	Total monthly rent rate for all spaces leased to a client for a normal month minus the discount, plus tax. Found on the 123 Accounting Screen.
Total Rent Due	{Clnt.Rdue}	Total current rent due for all spaces leased to a client. Found on the Payment Screen.
Total Letter Fees Due	{Clnt.LFdue}	Total current letter fees due for all spaces leased to a client. Found on the Payment Screen.
Total Misc. Due	{Clnt.Xdue}	Total current other fees due for all spaces leased to a client. Found on the Payment Screen.
Total Tax Due	{Clnt.Txdue}	Total Taxes Due for all spaces leased to a client. Found on the 123 Accounting Screen.
Total NonItems Due	{Clnt.Tnid}	Total charges and fees due (such as merchandise items and overlock fee, admin fee, or NSF fees) except the actual rental rate or late fees. Found on Payment Screen.
Invoice Fee	{Clnt.If}	Invoice Fee. Found in Site Policies under Site Setup.
Statement Fee	{Clnt.Sf}	Statement Fee. Found in Site Policies under Site Setup.
Work Street	{Clnt.Wstr}	Client Employer Street. Found under the Identification screen.
Work City	{Clnt.Wc}	Client Employer City. Found under the Identification screen.
Work State	{Clnt.Wst}	Client Employer State. Found under the Identification screen.
Work Postal	{Clnt.Wzip}	Client Employer Zip Code. Found under the Identification screen.
Total Due/No Prepaid	{Clnt.TDNP}	The total amount due on a client's account without considering prepaid amounts. Found on the Payment Screen.
Total Prepaid	{Clnt.TDPP}	Total amount of prepaid money on a client's account. Found on the Payment Screen.
Last 4 CC Digits	{Clnt.L4CC}	The last four digits of the Client's Credit Card found on the billing screen.
CC Exp. Date	{Clnt.CCed}	The Client's Credit Card expiration date found on the billing screen.
CC Type	{Clnt.CCty}	The Client's Credit Card type found on the billing screen.
CC Card Holder's Name	{Clnt.CCnm}	The Client's Credit Card holders name found on the billing screen.
CC Billing Postal Code	{Clnt.CCpc}	The Client's Credit Card billing zip code found on the billing screen.
Drivers License State	{Clnt.DLST}	Drivers License State as found on the Identification screen.
Other Phone	{Clnt.Ophone}	Cellular / Other phone number found on the Name & Address Screen.
Secondary Other Phone	{Clnt.2Ophone}	Cellular / Other phone number found on the Guest Name & Address Screen.

Vehicle Manufacture	{Clnt.Vman}	Vehicle Manufacture as found on the Identification screen.
Vehicle Model	{Clnt.Vmod}	Vehicle Model as found on the Identification screen.
Vehicle Year	{Clnt.Vyr}	Vehicle Year as found on the Identification screen.
Vehicle License No.	{Clnt.Vlic}	Vehicle License Number as found on the Identification screen.
Vehicle State	{Clnt.Vst}	Vehicle State as found on the Identification screen.

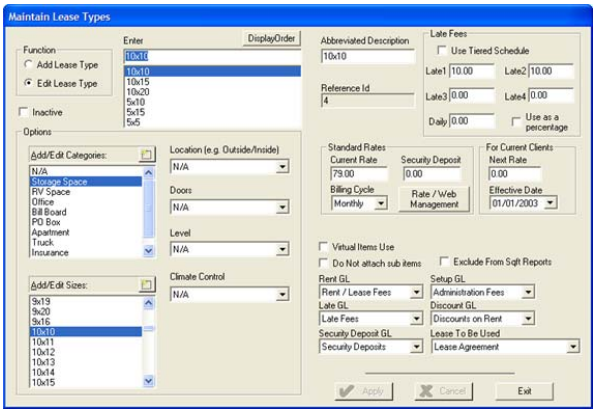
Space Charge Merge Fields - These Data Insert Fields are coded only to Space specific information.

Field Name	Merge Field	Description & Location
ID	{Itm.Id}	Space number of the space or lease item.
Description	{Itm.Desc}	Description of the Space or lease item.
Rate	{Itm.Rate}	Current rental rate of the Lease Item
Discount	{Itm.Dcnt}	Current amount discounted off of the Lease Item rate
Next Rate 1	{Itm.NR1}	Rental rate for the first scheduled rate increase
Next Rate 2	{Itm.NR2}	Rental rate for the second scheduled rate increase
Next Rate 3	{Itm.NR3}	Rental rate for the third scheduled rate increase
Next Discount 1	{Itm.ND1}	Amount of the first scheduled discount
Next Discount 2	{Itm.ND2}	Amount of the second scheduled discount
Next Discount 3	{Itm.ND3}	Amount of the third scheduled discount
Current Rate w/o Tax	{Itm.CRx}	Lease Items current rate, less the discount without tax
Current Rate + Tax	{Itm.CRt}	Lease Items current rate, less discount with tax
Next Eff. Rate	{Itm.NER}	Amount of next effective rate, less any scheduled discounts
Next Eff. Discount	{Itm.NED}	Amount of next effective discount
Next Eff. Rate Date 1	{Itm.NE1}	Effective date of the first scheduled rental rate increase
Next Eff. Rate Date 2	{Itm.NE2}	Effective date of the second scheduled rental rate increase
Next Eff. Rate Date 3	{Itm.NE3}	Effective date of the third scheduled rental rate increase
Lease Number	{Itm.LN}	The lease number for this Lease Item
Late Fee 1	{Itm.LF1}	Lease Item's first late fee
Late Fee 2	{Itm.LF2}	Lease Item's second late fee
Late Fee 3	{Itm.LF3}	Lease Item's third late fee
Late Fee 4	{Itm.LF4}	Lease Item's fourth late fee
Daily Late Fee	{Itm.DLF}	Amount of Lease Item's daily late fee
Paid To Date	{Itm.PDTO}	The date rent is paid to for the Lease Item
Next Assessment	{Itm.NXTA}	The date that the next rent assessment will be
Assessment Day	{Itm.Aday}	The day of the month that rent for the Lease Item is assessed
Space Rent Due	{Itm.Rdue}	Amount of rent due for the Lease Item
Space Late Fees	{Itm.Ldue}	Amount of late fees due for the lease item
Space Rent Tax Due	{Itm.Rtax}	Amount of rental tax due for the Lease Item
Space Late Fees Tax Due	{Itm.Ltax}	Amount of late fee tax due for the Lease Item
Space Rent + Tax Due	{Itm.Rtd}	Amount of rent and taxes due for the Lease Item
Space Late + Tax Due	{Itm.Ltd}	Amount of late fees and taxes due for the Lease Item
Total Space Charges Due	{Itm.TD}	Total amount due for the Lease Item, including rent, fees and taxes
Letter Fees	{Itm.LtrF}	Amount of letter fees due for a Lease Item
Late & Letter Fees	{Itm.LLF}	Amount of late and letter fees due for a Lease Item
Late, Letter & Tax	{Itm.LLT}	Amount of late and letter fees due plus tax for a Lease Item
Space Attached Fees	{Itm.Afee}	Amount of attached fees due for a Lease Item
Attached Fees + Tax	{Itm.AFT}	Amount of attached fees plus tax due for a Lease Item
Next Eff. Rt – Dscnt +Tax	{Itm.Nrdt}	Next effective rate less the discount plus tax for a Lease Item
Refund Voucher Number	{Itm.RFVN}	Refund Voucher Number. This number is found on the Documents Screen.

Owner-Business Name	{Itm.Bname}	Primary Client's Business Name. Found on the Name & Address Screen.
Owner-Salutation	{Itm.OSal}	Primary Client's Salutation. Found on the Name & Address Screen.
Owner-First Name	{Itm.OFname}	Primary Client's First Name. Found on the Name & Address Screen.
Owner-Last Name	{Itm.OLname}	Primary Client's Last Name. Found on the Name & Address Screen.
Owner-Street 1	{Itm.OStr1}	Primary Client's Street Address, Line 1. Found on the Name & Address Screen.
Owner-City	{Itm.OCity}	Primary Client's City. Found on the Name & Address Screen.
Owner-State	{Itm.OState}	Primary Client's State. Found on the Name & Address Screen.
Owner-Postal Code	{Itm.OZip}	Primary Client's Zip Code. Found on the Name & Address Screen.
Owner-Postal-Ext	{Itm.OZipExt}	Primary Client's Postal Code Extension. Found on the Name & Address Screen.
Owner-Country	{Itm.OCtry}	Primary Client's Country. Found on the Name & Address Screen.
Owner-Name/Address Line 1	{Itm.ONA1}	First line used in addressing the primary client on invoices, letters & Receipts. Will be the Business Name if there is one. If not, this will be the Client's first and last name.
Owner-Name/Address Line 2	{Itm.ONA2}	Second line used in addressing the primary client on invoices, letters & Receipts. If there is a Business Name in Line 1, this will be the Client's Name. If the Client's Name is in Line 1, this will be the first line of the street address.
Owner-Name/Address Line 3	{Itm.ONA3}	Third line used in addressing the primary client on invoices, letters & Receipts. If the Client's Name is in Line 2, this will be the first line of the street address. If the first line of the Street address is in Line 2, then this will be the Second line of the Street Address. If there is no second line of the Street Address and if the first line of the Street Address is in Line 2, this will be the City, State, and Zip Code.
Owner-Name/Address Line 4	{Itm.ONA4}	Fourth line used in addressing the primary client on invoices, letters & Receipts. If the City, State, and Zip Code are in Line 3, Nothing will be in this line. If the first line of the street address is in Line 3, then this will be the second line of the street address. If the first line of the street address is in Line 3 and there is no second line of the street address, then this will be the city state and zip code.
Owner-Name/Address Line 5	{Itm.ONA5}	Fifth line used in addressing the primary client on invoices, letters & Receipts. If there is no line 4, then there will be no line 5. If the second line of the street address is in line 4, then the city, state, and zip code will be in this line.
Leased Date	{Itm.Ldt}	The leased date is found next to the lease number on the Detail and Alter Information field.
Standard Rate	{Itm.StdR}	The standard rate is the undiscounted rate for a specific space size.
Next Rate 1 – Current Rate	{Itm.NR1LR}	This is the amount that the rate will change (up or down) at the next rate change. Found on the Detail & Alter Information field.
Total Charges Due + Total Clients Non Spaces	{Itm.CDNI}	This it the total of all charges due on a space + all charges due that aren't associated with a specified space. Found on the Payment Screen.
Security Deposit On Hand	{Itm.SOH}	Security Deposit on Hand can be found on the Detail & Alter Information screen.

Maintain Lease Types

To access the Maintain Lease Types function, select **Utilities/Maintain Lease Types**. Generally, this screen will already be completed in the Configuration when TaskMaster is purchased. However, if additional spaces are added or there is a need to change the pricing requirements for current spaces, the Maintain Lease Types screen will be used.



To Add a new Lease Type, click on the **Add Lease Type** radio button. Type a space name or size in the **Enter** field and a short description in the **Abbreviated Description** box. Then, complete the **Standard Rates**, **Late Fees**, **Locations**, **GL**, and **Add/Edit Sizes** sections. When you have completed all sections, click **Apply**.

To Edit a Lease Type, click on the **Edit Lease Type** box. Make any necessary changes, and then click **Apply**. To make a space type inactive, select it from the list and click **Inactive,** then click **Apply**.

Clicking on **Display Order** will change the order in which the spaces display on the Rent Roll reports and on the **New Client Move-in** and **Lease A Space** screens.

Clicking on **Do Not Attach Sub Items** allows you to create a monthly charge for items such as moving blankets or pallets that will be rented monthly but do not require an individual inventory of specific spaces.

Clicking on **Exclude from SqFt Reports** allows items such as RV spaces, mailboxes, sign rental, blankets, pallets, and shelving units to be rented to a client without including in the square footage reports.

Use **Standard Rates** to modify the Street Rates for a space type.

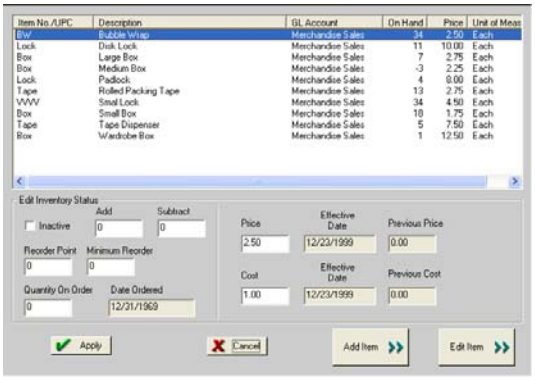
For Current Clients allows you to change the rate for all clients in that space type by typing a new rate in the **Next Rate** field and then setting the **Effective Date**.

Lease To Be Used allows you to specify the type of lease agreement that applies to the space. This allows different lease agreements to be used based on the type of space.

Maintain Merchandise

To access the Maintain Merchandise function, select **Utilities/Maintain Merchandise**. The **Maintain Merchandise** screen allows you to control the inventory of merchandise sold by the site such as boxes, bubble wrap, locks, etc.

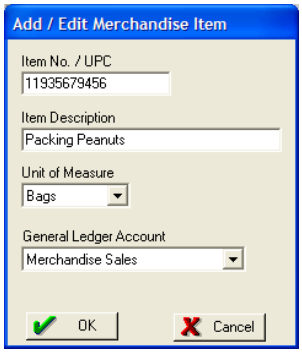
The original merchandise items should be set up with the Configuration of TaskMaster. To add a new item to the list, click **Add Item >>**. This will bring up the **Add / Edit Merchandise Item** window. Enter the Item Number or UPC code, Item Description, Unit of Measure, and General Ledger Account. Click **OK** to enter the item into the system.



To Edit an item, click on the item on the list and then click **Edit Item >>**. This will bring up the **Add / Edit Merchandise Item** window for that item to allow changes. **Price** per item and **Cost** per item can be entered and changed as necessary.

To make an item inactive, select it from the list and place a checkmark in the **Inactive** checkbox.

To add items to inventory as orders come in or to subtract items that are damaged, select the item from the list and type the number coming into or being removed from inventory under **Add** or **Subtract** as necessary. You can also track reorder points and amounts, quantities on order, and price changes on this screen. After making changes to inventory, click **Apply**.



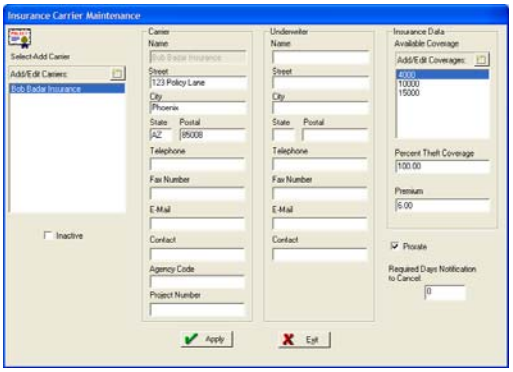
NOTE: Once merchandise has been discontinued, it should not be reused.

Maintain Insurance Carriers

Access the Maintain Insurance Carriers function by clicking on **Utilities/Maintain Insurance Info**. This screen allows a site to add, edit, or inactivate the insurance carrier. The information on this screen will be provided by the insurance carrier(s).

To add a carrier, click **New (Insert)** next to **Add/Edit Carrier** and complete the information as necessary. When complete, click **Apply**.

To edit or inactivate the carrier, click on the Name under **Add/Edit Carrier** and make any changes necessary. When complete, click **Apply**.

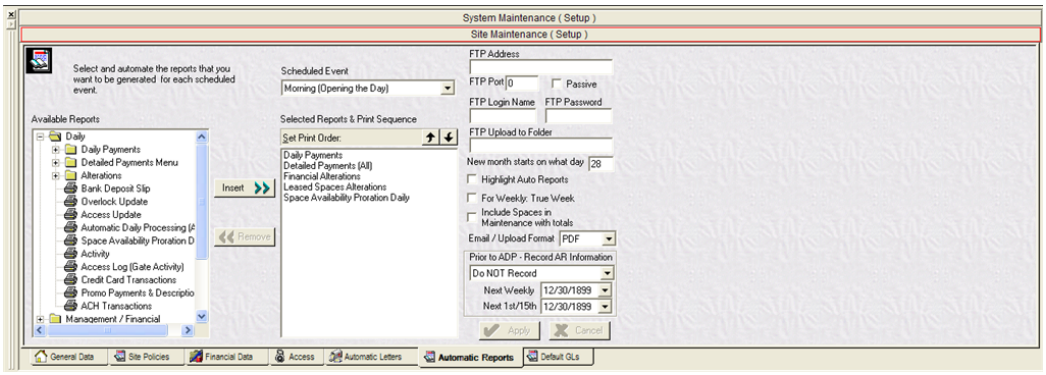


Management Tools

- **Automatic Reports**
- **Import/Export**
- **Demographics & Marketing**
- **Rental Agents**

Automatic Reports

Reports can be scheduled to automatically print, e-mail, or upload to an FTP server for management review. To schedule and maintain automatic reports, select **Utilities/Site Setup/Automatic Reports**.



Automatic Reports – Printing

In the **Automatic Reports** tab of Site Setup, select the **Scheduled Event** from the drop-down menu. Scheduled events include:

- Morning (Opening the Day) – These reports print during ADP in the morning.
- Evening (Closing the Day) – Print by selecting **File/Print/End of Day Reports**.
- End of Week (Month to Date) – These reports print automatically at the time set for the event in the **Schedule a Task** function.
- End of Month – These reports print automatically at the time set for the event in the **Schedule a Task** function.
- End of Year – These reports print automatically at the time set for the event in the **Schedule a Task** function.
- Audit – Print by selecting **File/Print/Audit Reports**.
- Area Manager– Print by selecting **File/ Print/Area Manager's Set**.

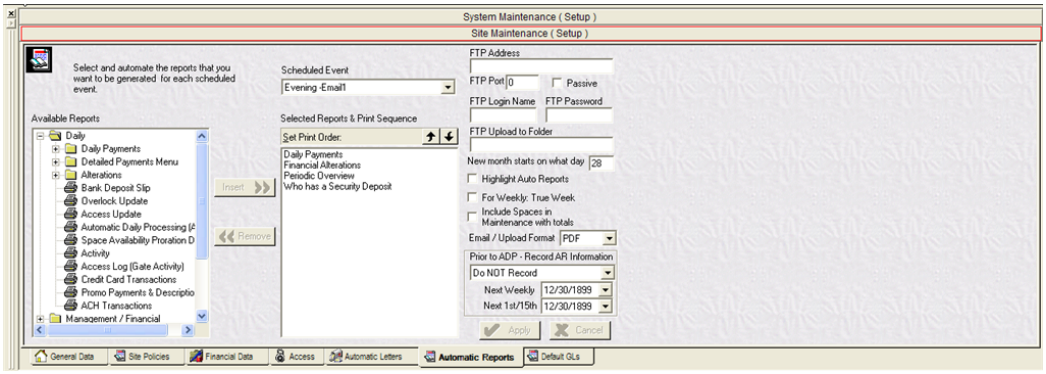
After selecting the **Scheduled Event**, click on the report that you want to print and then click **Insert >>**. If you need to remove an event, highlight the report and click **<< Remove**. Continue selecting and inserting reports until each report that you want printed during the **Scheduled Event** has been selected. After all selected reports for an event are selected, highlight individual reports and use the **Move Up** and **Move Down** buttons to change the report order. Click **Apply** to complete the setup for the event. Repeat this process for each **Scheduled Event** to be scheduled.

New Month Starts on What Day allows a site to change the beginning of its reporting month from the 1st to another date for accounting purposes.

The fields on the right side of the screen can be used to customize Automatic Reports. Click **Highlight Auto Reports** to add highlight lines that make the reports easier to read. Weekly reports are normally generated with month-to-date totals. By clicking on **For Weekly: True Week**, these reports will only show the totals for the week. **Include Spaces in Maintenance With Totals** allows you to select whether spaces that aren't currently rentable due to maintenance needs will be included in square footage calculations and other totals in the reports.

Automatic Reports – E-mail

The Automatic E-mail Reports are similar to the Automatic Reports Printing except that there are three steps/screens that must be completed.



Step 1: Select the Scheduled Event and insert reports as in the Automatic Reports Printing process for the following Scheduled Events:

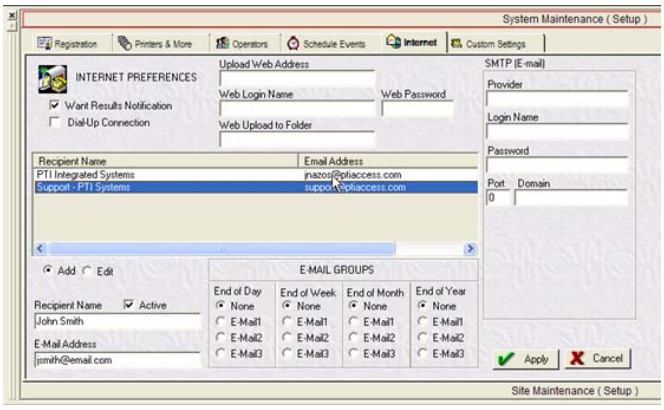
- Evening – Email 1
- Evening – Email 2
- Evening – Email 3
- End of Month – Email 1
- End of Month – Email 2
- End of Month – Email 3
- End of Week – Email 1
- End of Week – Email 2
- End of Week – Email 3
- End of Year – Email 1
- End of Year – Email 2
- End of Year – Email 3

The Email 1, Email 2, and Email 3 after each type of report refer to E-mail Groups. This allows you to send a different set of reports to the Manager, District Manager, and the corporate office (or any other department that you select).

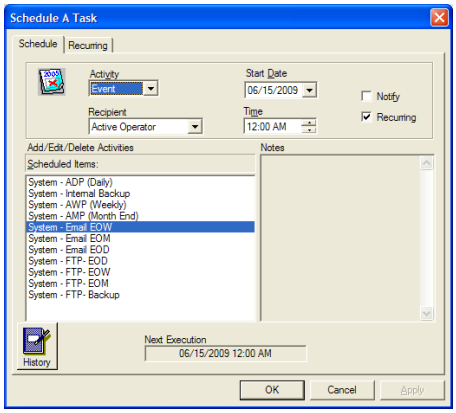
After selecting the **Scheduled Event**, click on the report to be e-mailed and click **Insert >>**. If you need to remove a report, highlight the report and click **<< Remove**. Continue selecting and inserting reports until each report that you want e-mailed during the **Scheduled Event** has been selected. After all selected reports for an event are selected, highlight individual reports and use the **Move Up** and **Move Down** buttons to change the report order. Click **Apply** to complete the setup for the event. Repeat this process for each **Scheduled Event** to be scheduled.

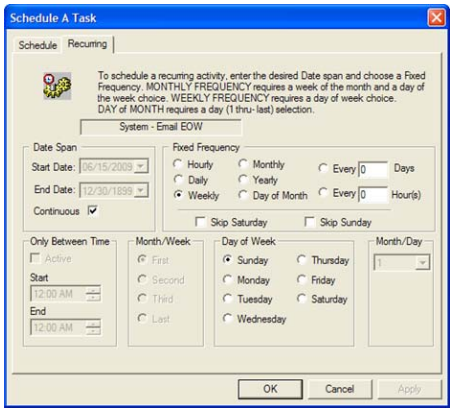
After setting up the reports, select the **E-mail/Upload format** from the drop-down menu on the right side of the screen.

Step 2: Click on **System Maintenance (Setup)**. Select the **Internet** tab. In the lower left-hand corner of the window, click **Add** and input the **Recipient Name** and **E-mail Address** for each person who is to receive e-mailed reports. Assign each e-mail recipient into **E-mail Groups** for End of Day, End of Week, End of Month, and End of Year. There are three possible e-mail groups for each of these reports and these can be configured as needed. When you have completed each entry, click **Apply**.



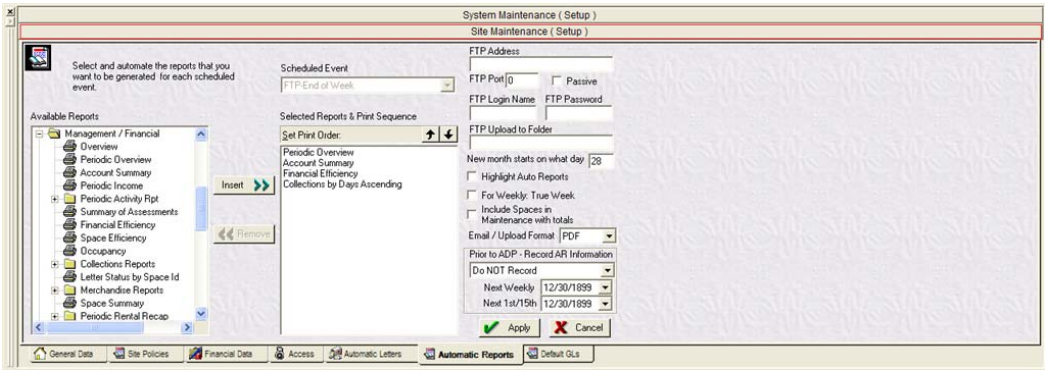
Step 3: Click on the Maintenance tab on the Taskbar and select **Schedule a Task**. In the Activity drop-down menu, select **Event**. Click on each System – E-mail report (EOW, EOM, EOD) and schedule the recurring times for these tasks.





Automatic Reports – FTP

The Automatic Reports FTP are similar to the Automatic Reports E-mail except that there are only two steps/screens that must be completed.



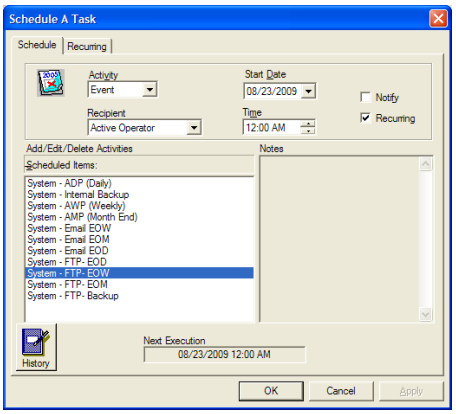
Step 1: Select the Scheduled Event and insert reports as in the Automatic Reports Printing process above for the following Scheduled Events:

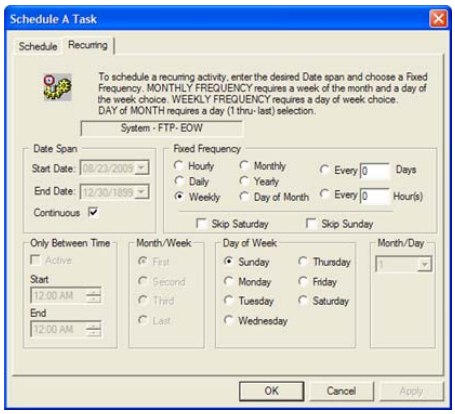
- FTP – Evening
- FTP – End of Week
- FTP – End of Month
- FTP – End of Year

Click on the report to be ftp'd and click **Insert >>**. If you need to remove a report, highlight the report and click **<< Remove**. Continue selecting and inserting reports until each report that you want sent during the **Scheduled Event** has been selected. After all selected reports for an event are selected, highlight individual reports and use the **Move Up** and **Move Down** buttons to change the report order. Click **Apply** to complete the setup for the event. Repeat this process for each **Scheduled Event** to be scheduled.

After setting up the reports, complete the FTP Address, FTP Port, Passive, FTP Login Name, FTP Password, and FTP Upload to Folder fields on the right-hand side of the screen. This information can be obtained from the site IT person or the FTP provider. Click **Apply**.

Step 2: Click on the Maintenance tab on the Taskbar and select **Schedule a Task**. In the Activity drop-down menu, select **Event**. Click on each of the System – FTP reports (EOW, EOM, EOD) and schedule the recurring times for these tasks.





Import/Export

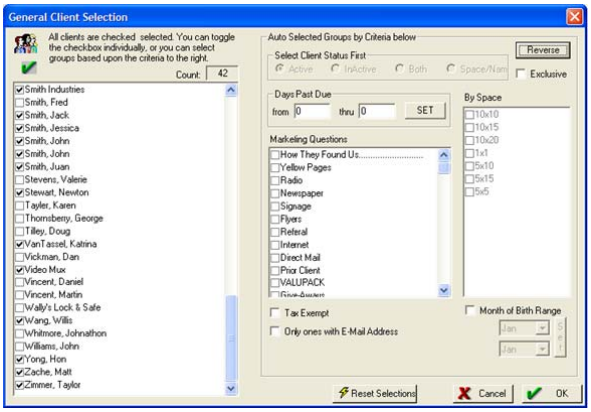
Import

TaskMaster can import data into its records. These data files must be in a specific format depending on the type of data. Import functions should only be performed by technical support.

Export

TaskMaster can export Client Data to a text file or export accounting data to one of three different Accounting Software Systems (QuickBooks, Solomon, or MAS90).

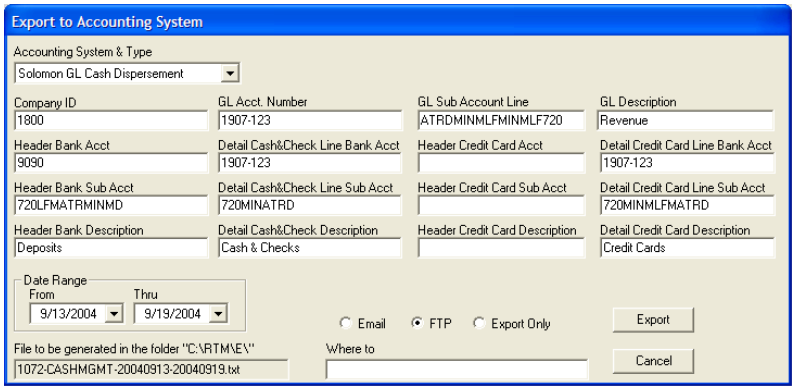
To export Client Data to a Text file, select **File/Import / Export/Export Data/Client Information**. This brings up the **General Client Selection** window.



Place a checkmark in the appropriate **Select Client Status First** checkbox in the upper right-hand corner. Customize the data by clicking next to names to checkmark them or uncheck them. Further limit the search parameters by selecting the number of days past due, setting specific marketing questions, or searching by space size, tax exempt status, e-mail addresses, or Birth month. To change your selections at any time, click **Reset Selections**. When you have selected all of the clients, click **OK**.

The **Export** window will then appear. Select the **Delimiter** type. This is the character or space that will separate the information fields in the report. Select whether you want quotes around the fields and click **OK**. The file will be saved in the \RTM\E folder. This file can be printed out or further exported to Microsoft Excel as needed.

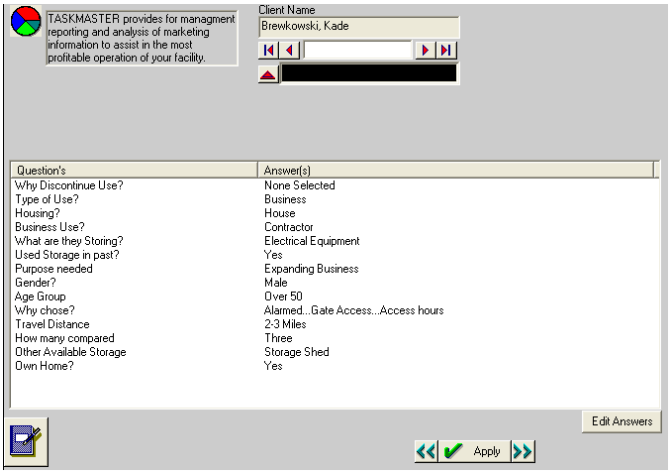
To Export to QuickBooks, select **File/ Import/Export /Export Data/QuickBooks**. Set up the Bank Name by clicking on **Setup**. Click **Export**. To Export to Solomon Cash Management, Solomon Cash Disbursement, or MAS90 Accounting Software, click **File/ Import/Export /Export Data/Accounting Information**.



In the Export to Accounting System window, select the **Accounting System & Type**. Complete the other necessary fields on the screen and click **Export**. All information must exactly match the Accounting Software or the export will not work correctly.

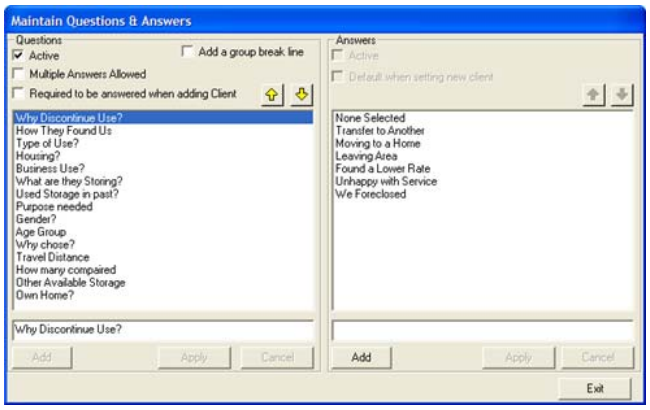
Demographics & Marketing

TaskMaster has the capability to track demographics and marketing data for a site for analysis by site management. To add, change, or deactivate these questions, select **Utilities/Site Setup/Questions & Answers**.



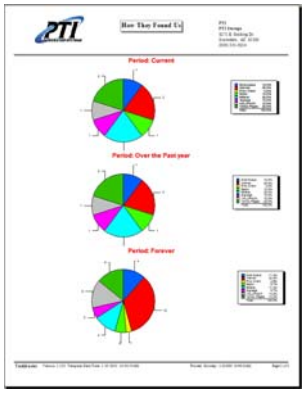
There are a series of Questions and Answers that can be asked of clients when they are rent, transfer, or vacate spaces. These questions can be reviewed in report or graph form to determine why clients chose the facility, what they are using it for, why they left, or for any other data to be tracked.

Some general questions and answers have been provided. You can customize these or create your own. To deactivate a question or answer that already exists, click on the **Active** checkbox. You can limit customers to one answer per question or allow multiple answers by clicking on **Multiple Answers Allowed**. To remind the operator to ask certain questions, place a checkmark in the **Required to be Answered when adding Client** checkbox.



Groups of questions can be separated with a line between them by clicking on the question that begins a new group and then clicking **Add a group break line** and **Apply**. When these answers are viewed from the **New Client Move-in Wizard** or from the **Transfer** or **Vacate a space** windows, there will be a line break above the selected question. Questions or answers can also be placed in a different order. Select a question from the list and click on the **Move Up** or **Move Down** buttons.

To add a new question or answer to the lists, click **Add** and type the question or answer in the space provided. After changes are made, click **Apply** then **Exit**.



As the demographic and marketing data is collected over time, reports and graphs can be printed from the **Reports** function, which allows data to be reviewed and analyzed. These reports and graphs are in the **Reports/Graphs & Charts/Demographics** folder.

Rental Agents

Outside sales help (Rental Agents) is sometimes used to help get more clients into the site. These persons are often paid on a commission basis. The Rental Agent Function allows you to track these charges.

To enter the Rental Agent Function, select **Utilities/System Setup/Rental Agents**.

Agent names are entered in the field below the Active button. Place a checkmark in the field if the agent is active and remove the checkmark when they no longer work for the company.

Flat or Percentage commission can be input on a single or recurring basis. If a recurring commission is selected, the frequency of payment must be selected. Once all information is entered, click **Add**. Click **OK** when you are finished entering Agents.

Modules & Other Options

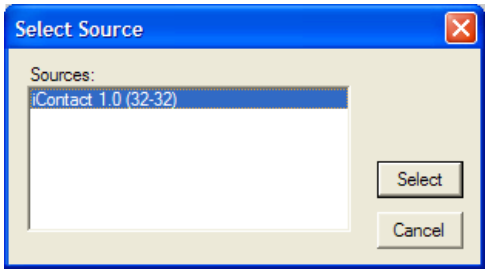
There are 11 modules that can be added to TaskMaster to increase the functionality of the program. TaskMaster does not require these modules to function effectively as a site management software; however, there are many useful tools within these modules that can help improve the efficiency, sales, and security of a site. If you are interested in purchasing one or more of the modules, please contact Chamberlain Access Solutions business development at (800) 331-6224.

- **Camera Module**
- **Electric Module**
- **Water Module**
- **Credit Card Module**
- **Central Office**
- **Web Sales**
- **WebXpress**
- **Kiosks**
- **Networking**
- **Gate Interface**
- **Site Master Graphics**

Camera Module

The Camera Module allows a site to take photographs of a client, the client's driver's license or identification, their vehicle, or their guests. This helps to prevent thieves from accessing spaces and allows instant access to a client's image if there is any doubt about the person trying to access a space. Should the need arise, a copy of the photo can be printed out and provided to the police or other authorities. Each client's photo is stored in their file and there is no limit to the number of photos stored for each client. Photos can be scrolled through at any time on the **Identification** screen.

Using the Camera Module, follow these steps to take a client's photo:



1. Make sure that you have an internet ready USB camera connected to the computer. Click on the Maintenance tab on the Taskbar. Select **System Setup/Printers & More/Select Photo Source**. Select the USB camera source from the drop-down list and click **Select**.

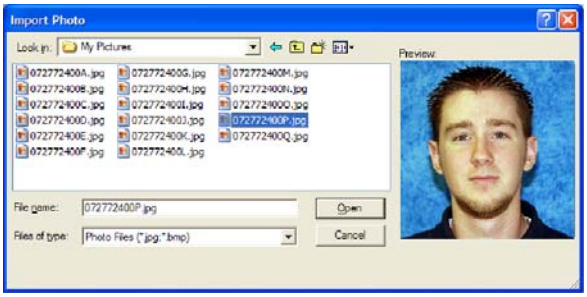
2. On the **New Client Move-In** wizard, the Identification step provides a chance to take the client's photo. Click on **Take a Picture** to bring up the snapshot window.

3. When the Camera screen pops up, click on the snapshot or take a picture button. This screen and button will vary depending on the type of internet camera being used. (The screen shown to the right is from the iContact® camera.)

   If the camera allows, check the format or settings to verify that the picture output is 320 x 240 at 96 dpi. Depending on the camera type, you may be able to set the output one time or you may have to set it every time you take a picture.

You can also import photos from other sources such as scanners, digital cameras, and USB devices:

1. On the **New Client Move-In** wizard, the **Identification** step provides a chance to import the client's photo. Click **Import a Picture** to bring up the Import Photo window. Find the photo on your computer and click **Open** to bring the photo into TaskMaster.

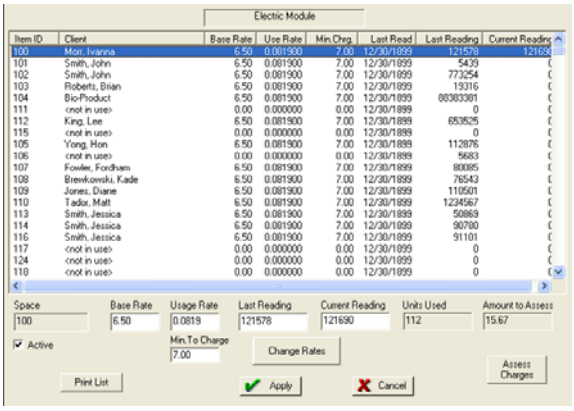


Other Photo Module functions are located under the Client Data Tab on the Taskbar in **Identification**.

- Print copies of client photos by clicking **Print**.
- Open pictures for editing in Microsoft Paint by clicking **Paint**.
- Scroll through all pictures on a client's file using the **Scroll** buttons.
- Delete a picture by clicking **Delete**.
- Keep a picture as the current one showing by clicking **Last** L.

Electric Module

The Electric Module allows a site to pass on electrical costs to clients that use electricity within their spaces or connect RVs, mobile homes, or boats (at a marina) to the site's electricity. Each space that is being charged for electricity must have an electric meter to take readings.



If you have purchased the electric module, the function can be accessed by selecting **Utilities/ Power & Water Modules/Electric Module**.

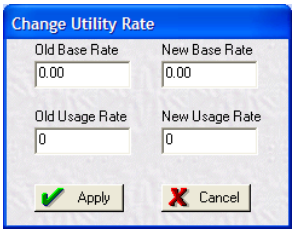
Every space on the site will be listed on this screen. Select a space to be charged for electrical use. Input the **Base Rate**. This rate is the monthly charge for using the service. Input the **Usage Rate**. This rate is the charge per unit of electricity. The Usage Rate will be multiplied by the number of Units Used each month. Units are often kilowatt hours, but can be any measurement that the site chooses. Input the **Min. to Charge**. This rate is the minimum usage rate to charge. Any usage below this amount will be charged at this rate. Any usage over this amount will be charged the actual usage rate multiplied by the number of units used.

The first time that the client is connected to the electric meter for their space, the initial reading will be put in the **Last Reading** field. Enter this information and click **Apply**. Repeat this process for each client that will be charged for electricity.

At the end of the month, click **Print List**. This provides a printout report of each space so that the manager can take a current reading at each meter, writing the current reading down on the report.

The new reading is then entered into the **Current Reading** field. After entering this information, click **Apply**. Do this for all client's that are set up for electricity, even if they didn't use any in the current month and the meter reading is the same.

After all meter readings have been entered into the **Current Reading** field, click **Assess Charges** to assess each client's account.

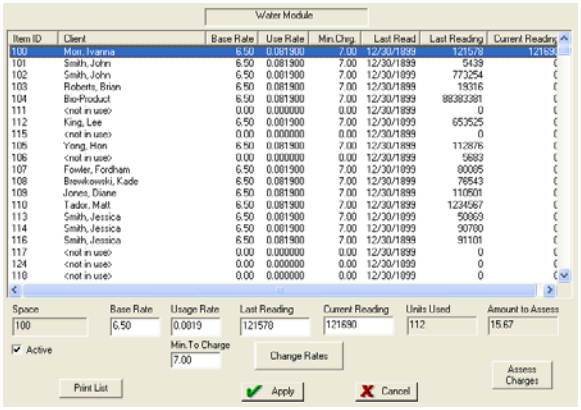


If the rates change at the site, click **Change Rates**. Make any rate changes and click **Apply** to set the rate changes for all clients. This can also be used during the initial setup if everyone's Base Rate and Usage Rates are the same.

NOTE: Schedule an event to reoccur each month to remind the manager to read the meters and add the charge to each account.

Water Module

The Water Module allows a site to pass on water costs to clients that use water within their spaces or connect RVs, mobile homes, and boats (at a marina) to the site's water. Each space that is being charged for water must have a water meter to take readings.



If you have purchased the water module, the function can be accessed by selecting **Utilities/ Power & Water Modules/Water Module**.

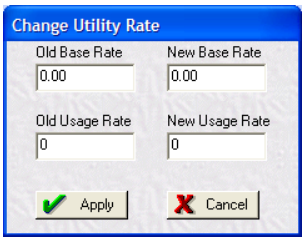
Every space on the site will be listed on this screen. Select a space to be charged for water use. Input the **Base Rate**. This rate is the monthly charge for using the service. Input the **Usage Rate**. This rate is the charge per unit of water. The Usage Rate will be multiplied by the number of Units Used each month. Units are often gallons, but can be any measurement that the site chooses. Input the **Min. to Charge**. This rate is the minimum usage rate to charge. Any usage below this amount will be charged at this rate. Any usage over this amount will be charged the actual usage rate multiplied by the number of units used.

The first time that the client is connected to the water meter for their space, the initial reading will be put in the **Last Reading** field. Enter this information and click **Apply**. Repeat this process for each client that will be charged for water.

At the end of the month, click **Print List**. This provides a printout report of each space so that the manager can take a current reading at each meter, writing the current reading down on the report.

The new reading is then entered into the **Current Reading** field. After entering this information, click **Apply**. Repeat this process with each client that is using water (even if they didn't use water and the meter reading is the same).

After all meter readings have been entered into the **Current Reading** field, click **Assess Charges** to assess each client's account.



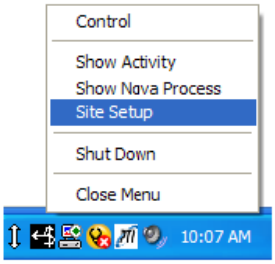
If the rates change at the site, click **Change Rates**. Make any changes and then click **Apply** to set the rate change for all clients. This can also be used during the initial setup if everyone's Base Rate and Usage Rates are the same.

NOTE: Schedule an event to reoccur each month to remind the manager to read the meters and add the charge to each account.

Credit Card Module

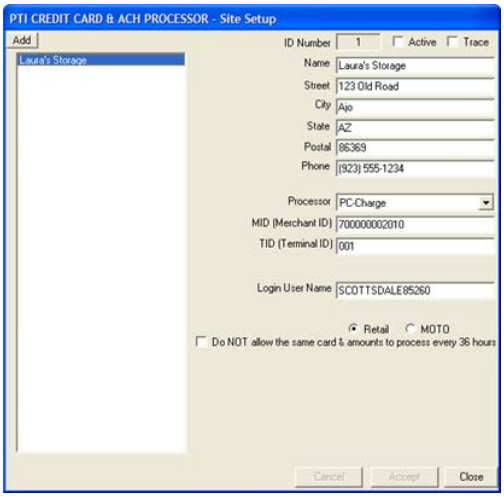
The Credit Card Module allows a site to accept credit cards for payment through NOVA Systems, PaymenTech, PCCharge Pro, and ECHO. In addition to purchasing the Credit Card Module, you must also maintain an account with the credit card processing company. Credit Card numbers can be typed in or a swipe reader can be purchased to allow credit cards to be swiped for payment.

Setup



The Credit Card Processor will start automatically when TaskMaster is started. Right-click on the **Credit Card Processor** icon in the System Tray. Select **Site Setup**.

In the **Site Setup** window, click **Add**. Click the **Active** checkbox. Enter the site information and the credit card processing information.



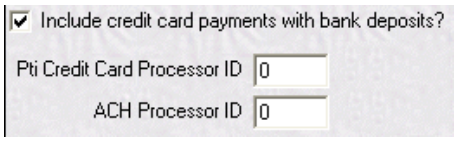
In the drop-down menu for **Processor**, select the company being used to process credit card transactions. Enter the information required by the credit card processing company.

Verify the **Use Internet for Connections** box is checked, and then click **Accept** and **Close**.

To add another site, repeat the process. Sites can be made inactive at anytime by removing the checkmark from the **Active** checkbox.

To edit a site, highlight the site name in the window, make the modifications, select **Accept** and **Close**.

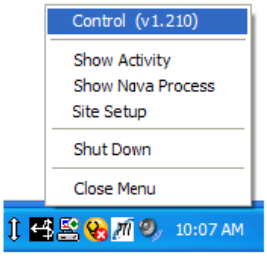
Credit Card Module Setup within TaskMaster



Click on the **Maintenance** tab on the Taskbar and select **System Setup.** From the **Site Maintenance (Setup)** window, click on the **Financial Data** tab. At the bottom of the screen, click on the **Include Credit Card Payments with Bank Deposits** checkbox if your bank provides that service. Otherwise, leave the checkbox empty. Input the **Credit Card Processor ID** found in the **ID Number** field of the Credit Card Processor **Site Setup** screen. Click **Apply**.

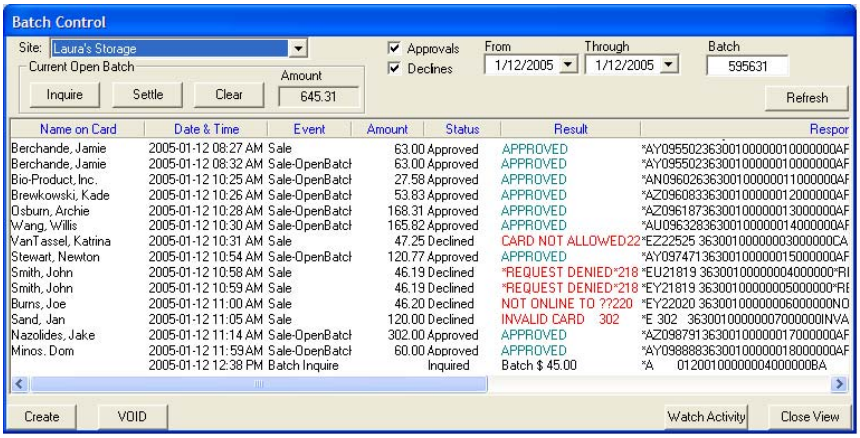
Batch Control

Right-click on the **Credit Card Processor** icon in the System Tray. Select **Control**. This brings up the **Batch Control** screen.



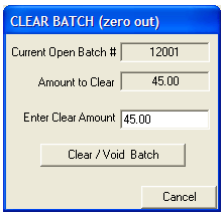
Batch Control allows the user to control the batch process including settling cards, forcing transactions, and reviewing previous transactions for the site. “Batch” refers to any group of credit card transactions that have been approved by the credit card company but have not yet been settled. Before the batch is settled, individual transactions can be voided. After settling the batch, transactions cannot be changed. Refunds are then done as a new transaction.

When you set up your account with the credit card processing company, you will choose whether to automatically settle the daily batch during the middle of the night or require the manager to manually settle the daily batch at the end of the day. We recommend that you choose automatic settlement of the daily batch.

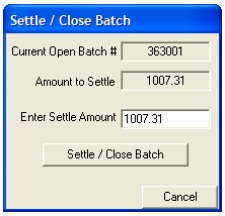


To view the transactions for a specific site, click in the **Site** drop-down menu and select a site. This will bring up all of the credit card transactions for that site on the current day. To see previous days, change the **From** and **Through** dates at the top of the screen. You can also elect to see only approved or declined transactions (or both) by clicking in the **Approvals** and **Declines** checkboxes. After making any changes to the screen, click **Refresh**. Click **Close View** to close the screen.

Click **Inquire** to send an inquiry to the credit card processing company and return an answer that lets you know how much the current open batch has outstanding. This will appear as a line in the Batch Window along with the other transactions. After the batch has been settled, the inquiry will return a $0.00 amount.

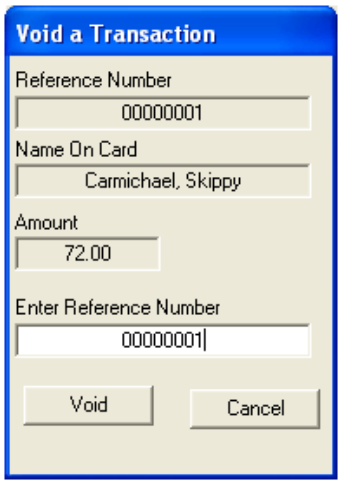


Click **Clear** to void all transactions in a batch. This cannot be done after the batch is settled. Enter the amount to clear and click **Clear/Void Batch**. This clears out all current transactions in the batch but does not settle the batch.



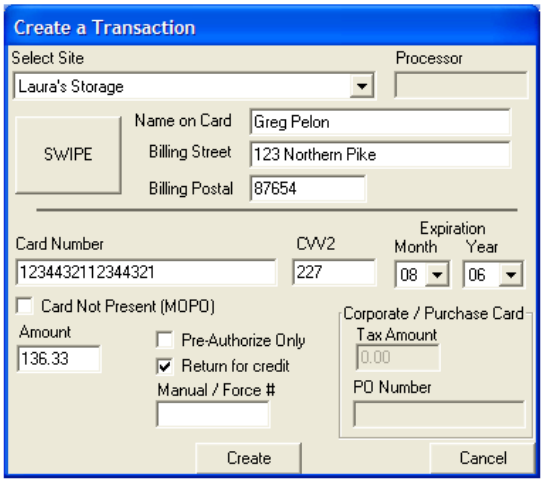
To settle the batch manually, click **Settle**. If you have arranged automatic settlement, this is not required. On the Settle/Close Batch screen enter the amount to settle, and then click **Settle/Close Batch**.

To void a single transaction, click on the transaction in the window on the Batch Control screen. Then click **Void**. Only items that have not been settled can be voided. Prior to settling a batch, approved items will appear in light blue. After settling a batch, approved items will appear in dark blue. This will help distinguish between items that can be voided and those that cannot.



In the **Void a Transaction** window, **Enter the Reference Number** in the field. The reference number is found at the top of the window. Click **Void**. The next time that you enter the Batch Control screen, the voided transaction will show as approved, but it will be in orange. This tells you that the transaction was originally approved but later voided.

It is possible to make a credit card transaction outside of TaskMaster using the Credit Card Processor. This allows a credit card transaction that is not done through a specific client account. This is generally only used when returning merchandise for credit.



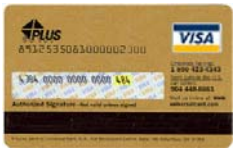
In the Batch Control Screen, click **Create** to bring up the **Create a Transaction** window. Select the site name from the **Select Site** drop-down and complete the Name on Card, Billing Street, and Billing Postal fields. Generally, you can receive a better rate from the credit card company if you have the Billing Postal fee completed.

To swipe the card, click **Swipe**. If you do not have the actual card, input the **Card Number**, and **Expiration Month** and **Year**. If the card is not present, place a checkmark in the **Card Not Present (MOPO)** checkbox.

The CVV2 (Card Verification Value) field is used to help prevent fraud. The CVV2 is a three or four digit number that appears on the back side of the card and is not stored in the magnetic strip. The only way to acquire this number is to have the card in front of you. If you get this number from clients and input it in the field, you can generally receive a better rate from the credit card company.

American Express
Front of Card above Card Number
Right Side of Card

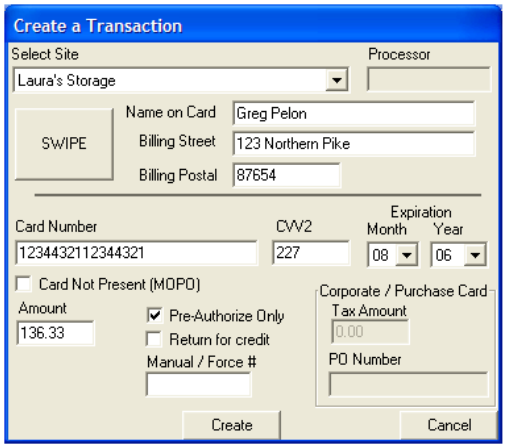
Discover Card
Back of Card next to Card Number in Signature line
Right Side of Card



MasterCard or Visa
Back of Card next to Card Number in Signature line
Right Side of Card

To complete the **Create a Transaction** function, input the **Amount** of the transaction.

If you are only preauthorizing the card, click **Pre-authorize Only** and click **Create**. Preauthorizing the card sets aside the money in the account, but doesn't actually transfer money. This feature is often used as a security deposit for Truck Rentals. If the client returns the truck with no damage and a full gas tank, then the money never comes out of the client's card.



NOTE: TaskMaster doesn't release these funds if you don't use them, the Credit Card Issuer does. Therefore, when a card is preauthorized for $100, the client will have $100 less credit to use until the Credit Card Issuer releases the preauthorization. If the preauthorization is to be released less than 24 hours after the rental, the site manager must contact the credit card company to have the preauthorization released.

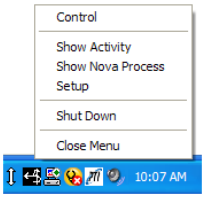
When you Preauthorize funds, the **Result** field on the **Batch Control** screen will show Approved with a six digit approval code. This code is used for a Manual / Forced Transaction if the preauthorized funds are needed. Using the previous example, if the client returns the truck with damage, the site can repeat the **Create a Transaction** process, inputting the six digit approval code in the **Manual/Force #** field. Then click **Create**.

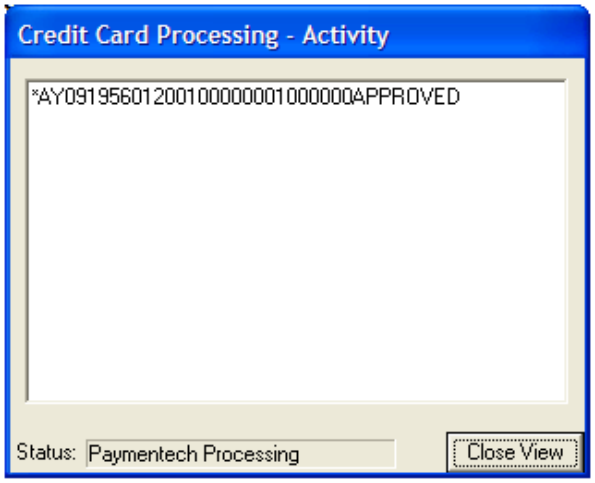
In many cases, this preauthorization process can be done over the telephone with the client's Credit Card Issuer. Call the Credit Card Issuer to obtain a six digit approval code that can be used in a Manual/Force Transaction later, if needed.

Return for Credit is used when a transaction must be voided after the batch is settled. Input the amount to be returned to the client's card and click **Create**.

The **Corporate/Purchase Card** section is used when a client pays with a small business corporate card. The Credit Card Processor program can tell which card is a corporate card and will automatically highlight this section. The client must provide a Purchase Order Number to be input in the **PO Number** field. After inputting the **Tax** and **PO Number** fields, click **Create**.

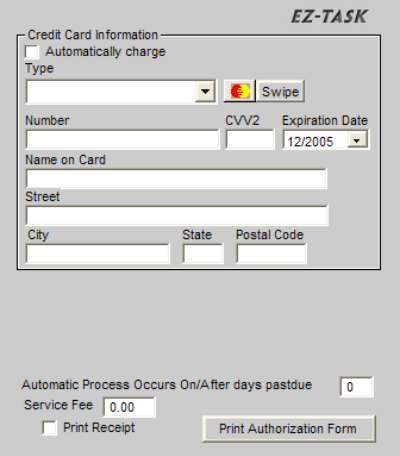
The **Show Activity** button on the Batch Control screen can be used for troubleshooting credit card processing activity to see if there are problems in the process. This screen is primarily used by technical support.





Using Credit Cards in TaskMaster

On the New Client Move-In wizard, the Billing screen allows you to input credit card information for regular billing purposes. If the client will be automatically paying each month with the card, place a checkmark in the **Automatically Charge** checkbox. The client must complete an Authorization form to allow this. Click **Print Authorization Form** to print the form.



To swipe the card, click **Swipe**. You can also manually input the information into the Type, Number, CVV2, Name on Card, Street, City, State, and Postal Code fields.

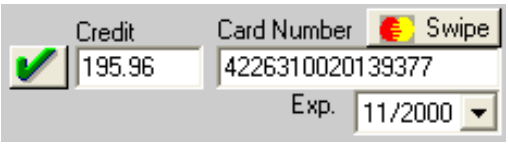
The client's account can be set up to automatically charge the account if the customer does not pay by a certain date, activate this feature by filling in the **Automatic Process Occurs On/After Days Past Due** field.

To add a service fee for automatic credit card processing, input the fee in the **Service Fee** field.

Place a checkmark in the **Print Receipt** box to automatically print a receipt that can be sent to the client after each automatic credit card processing.

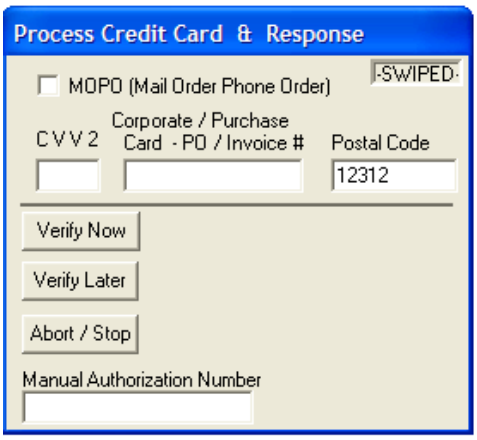
This information can also be added to a client's account at a later date in the **Billing Info** screen under **Client Data** on the Taskbar.

To take an individual payment on a client's account using a credit card, with the client's account active on the screen, go to **Tasks/Take a Payment**.



Enter the amount to be charged in the **Credit** field. Click **Swipe**. You can also enter the **Card Number** in the field and the expiration date in the **Exp** field. Click **Apply Payment** and then click **Accept**. This brings up the **Process Credit Card & Response** window.

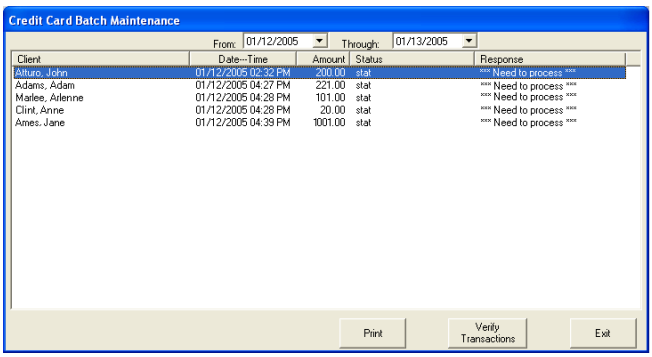
If the client provided you with the credit card information over the phone, place a checkmark in the **MOPO** checkbox.



Input the **CVV2** Number, if available, along with the **Postal Code**. If the Card is a Corporate/Purchase Card, enter the PO Number. This is required for Corporate purchase cards.

If you are forcing a transaction based on a previous preauthorization, input the six digit preauthorization number in the **Manual Authorization Number** field.

After completing the **Process Credit Card & Response** fields, click **Verify Now** to immediately run the credit card for approval. If, for some reason, the internet connection is not working, click **Verify Later** to hold off verification until internet service has resumed.



If you elect to **Verify Later**, you can always go back and click on the button in the Toolbar. This brings up the Credit Card Maintenance for pending transactions. Click **Verify Transactions** to finish processing.

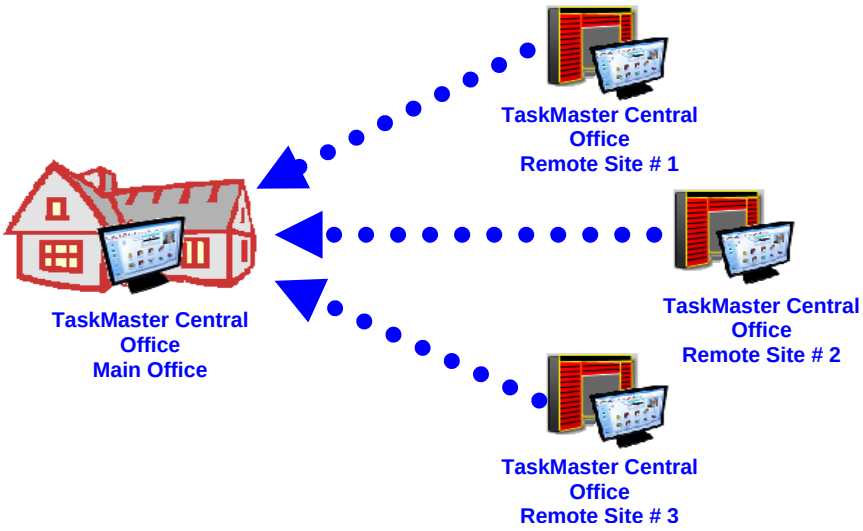
Central Office

TaskMaster Central Office allows an owner of multiple sites or an owner that lives far away from the site(s) to manage marketing and financial data remotely. This is also a useful tool for management companies.

Information can be downloaded from the TaskMaster data for an individual site or from multiple sites for comparative reporting.

Information from TaskMaster at the remote site(s) is automatically uploaded to the TaskMaster Central Office main site computer many times each day via FTP (File Transfer Protocol) or VPN (Virtual Private Network). Depending on the number of remote sites and the bandwidth of the internet connection(s), data can be transmitted with a low lag time.

Each remote site functions independently in TaskMaster. The remote site must be manned and all client functions in TaskMaster must be controlled from that end. TaskMaster Central Office is merely a one-way conduit of data coming from the remote site to a central computer at the main office.



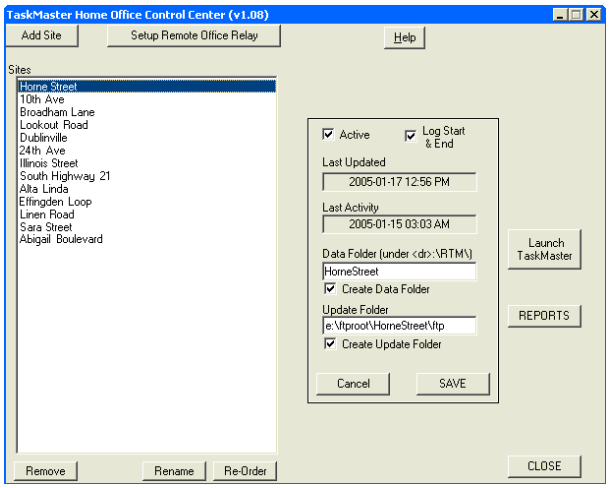
Setting up the FTP or VPN

We strongly recommend that the FTP or VPN be set up by an experienced, knowledgeable Network Information Technology professional. We do not provide this service. The FTP or VPN server should be located at the Main Site and have an always on, static IP, business high-speed internet connection. Each remote site should have a computer with TaskMaster and a high-speed internet connection.

NOTE: Please discuss firewall settings with your IT professional to ensure data security at the site, but still allow full communications.

Setting Up Central Office at the Main Site

Technical support must dial into the Main Site computer and upload the main site files. They will set up two programs; TaskMaster Central Office Disbursement (TMHOD) and TaskMaster Central Office (TMHO). TMHOD must be placed in the Startup folder. TMHOD must be running at all times or the Remote Site computers cannot update the data. Click on TMHO to start the TaskMaster Central Office Control Center. This will allow you to set up Central Office at the Main Site.



Click **Add Site**. Input the Name of the first remote site. Place a checkmark in the **Active** checkbox to make the site active. Also, ensure that the **Log Start & End** checkbox is checked.

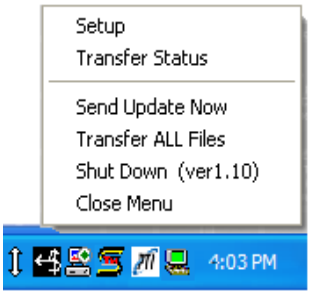
Input the name of the data folder where the site will upload their information to. If the folder doesn't exist, click **Create Data Folder**. This is where the site data will be kept on the main computer. The data folder must be a subfolder of the \RTM\ folder.

Input the name of the Update Folder. If the folder doesn't already exist, click **Create Update Folder**. This is the FTP folder where the update file log (F-Log) will upload to from the site. TMHOD takes this F-Log file and updates the Data in the data folder every time the site information uploads into this folder.

Click **Save** to set up the remote site folders at the main site. Repeat this process for each remote site.

To rename a site, highlight the site and click **Rename**. Highlight the site and click **Remove** to remove a site from the list. Highlighting a site and clicking **Reorder** will change the site order displayed.

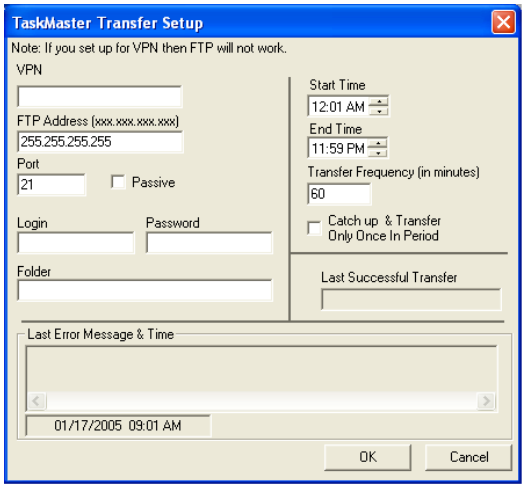
Setting Up Central Office at the Remote Site(s)



When you purchase Central Office, technical support will turn the module on at each site within TaskMaster during the configuration.

Once the FTP Server or VPN is set up, each Remote Site will have to have TaskMaster loaded on the computer and have the Central Office Transfer set up. To do this, right-click on the Central Office Transfer Interface icon in the System Tray of the computer and select **Setup** from the list.

The Transfer Setup window will appear. If the Central Office is being run through a VPN, then enter the VPN name in the **VPN** Field. If Central Office is being run through FTP, then enter the FTP Address in the **FTP Address** field. The IT professional should provide this information along with the **Port** and **Passive** settings.

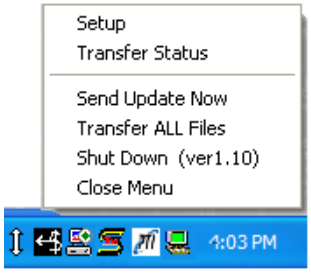


The **Login** and **Password** fields must match the Login and Password for the Update folder created for the remote site on the main site computer. The **Folder** field will be the actual name/path of the update folder on the main site computer.

Set the **Start Time** and **End Time** for the transfer. Generally, this should be just before and just after business hours, so that the transfer doesn't have to keep working through the night when no information is being updated. Setting the start time at 12:00 am and the end time at 11:59 pm will make the process occur 24 hours per day.

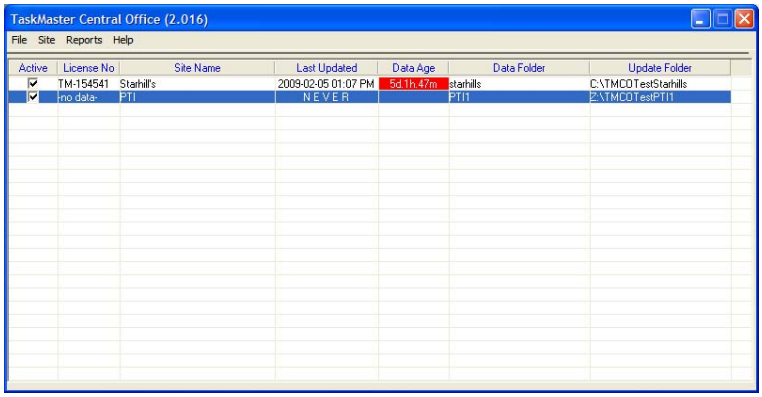
Using Central Office at the Remote Site(s)

The first time that Central Office is activated at a remote site, right-click on the Central Office Transfer Interface icon in the System Tray and select **Transfer ALL Files**. This will start the initial update. From that point forward, any time that TaskMaster is open, the Central Office Transfer will occur based on the intervals set up. The remote site is not required to do anything for the Central Office Transfer except to keep TaskMaster open during the day. The Central Office Transfer Interface will be invisible to the remote site.



Using Central Office at the Main Site

Once Central Office is set up at the Main Site and all Remote Sites, the owner or management company can start using the program.

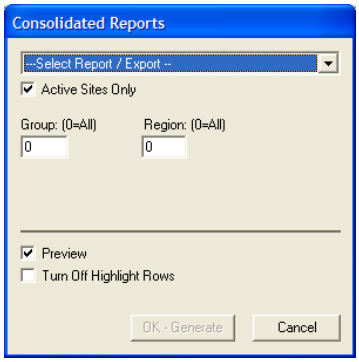


Click on TaskMaster Central Office to start the Central Office program. This is the same screen that lets you set up Central Office.

To view the data and run reports for a specific remote site, select the site from the list and click **Launch TaskMaster**. This launches TaskMaster with the most recent data from that site. You can tell how recent the data is by looking at the **Last Updated** and **Last Activity** fields. You can run reports inside TaskMaster on the specific site that you opened and view any data or customer information for that site.

NOTE: Any changes made in TaskMaster data at the main site will not affect the TaskMaster running at the remote site. This is a one-way connection.

You can also run comparative reports on multiple sites. Be sure that TaskMaster is closed. Open the TaskMaster Central Office and click **Reports/Consolidated Reports**.

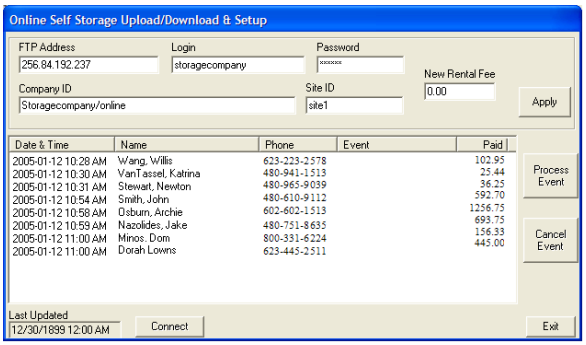


The **Consolidated Reports** window will appear. This allows you to print many different types of reports that compare/contrast multiple remote sites or give specific information on a single remote site. If you have set up the remote sites with group and region numbers (General Data Tab in Site Maintenance), then you can use these to limit the site(s) that you run reports on. You can also customize the Date range in the **From** and **Thru** fields, view Active Sites only (or all sites), and highlight reports. When you have made your selections, click **Execute**.

Web Sales

TaskMaster interfaces with Online Self Storage's Web Sales, which allows a site to use Online Self Storage's web site to take client payments and rent spaces.

If the site uses Online Self Storage's (OSS) web sales, OSS will set up the link and OSS Software for you, as well as provide training in using the OSS software. TaskMaster software continues to operate as designed.



Each morning, the site manager will have to update TaskMaster and OSS. To perform this function, select **Utilities/Online Self Storage**. This pulls up the **Online Self Storage Upload/Download & Setup**.

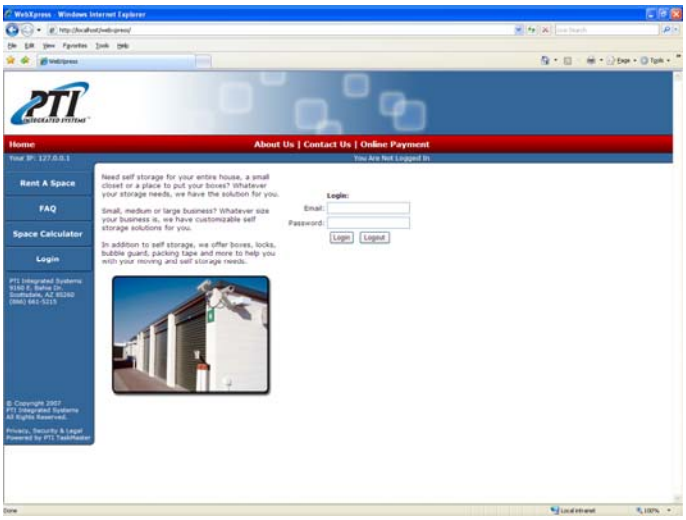
During the initial setup, the FTP address, Login, Password, Company ID, and Site ID provided by OSS must be entered at the top of the window. Click **Apply**.

During the morning update, the manager will click **Connect** to connect to OSS and update the list. Then the manager will select each new event from the list and click **Process Event**. This takes the payment in TaskMaster.

To cancel or remove an event, select it from the list and click **Cancel Event**.

WebXpress

The WebXpress module allows the site to have a web site on the internet where clients can rent spaces and pay their bills.



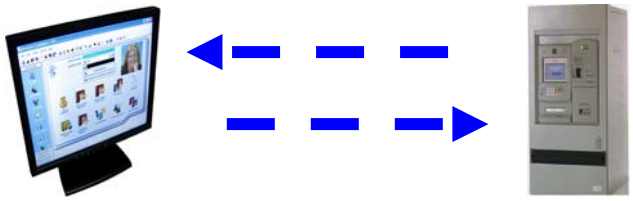
The web site can be designed by a web design company to be a part of an existing company web site, or they can create a complete custom web site for your company. Chamberlain Access Solutions does not provide this service; the site must contract with the web design company directly.

As client's visit the site to rent spaces or pay their bills, the information automatically updates in TaskMaster as if they had been at the site in front of the manager.

Kiosks

TaskMaster interfaces with two Kiosks: the *SAM* and Open Tech Alliance's *Insomniac*. These freestanding computer stations are often used to replace an on-site manager, allowing clients to rent spaces, pay rent, and perform other basic customer functions from a computer at the site without needing a manager.

All payment, rental, billing, and other such functions are still handled in TaskMaster by a site manager or owner, but the client uses the Kiosk software.



If you purchase a Kiosk along with TaskMaster, the Kiosk company will set up the link and Kiosk Software for you, as well as provide training in using the Kiosk software. TaskMaster software continues to operate the same as shown in this manual.

NOTE: The TaskMaster configuration should be set up to allow client credits so that customers can pay by credit card at the kiosk. When the site manager sees notification of a kiosk payment, they must apply the client credit to the client's account so that the customer gets credit for the payment. While TaskMaster will recognize the client credit, it will not automatically apply the credit to the client's amount due.

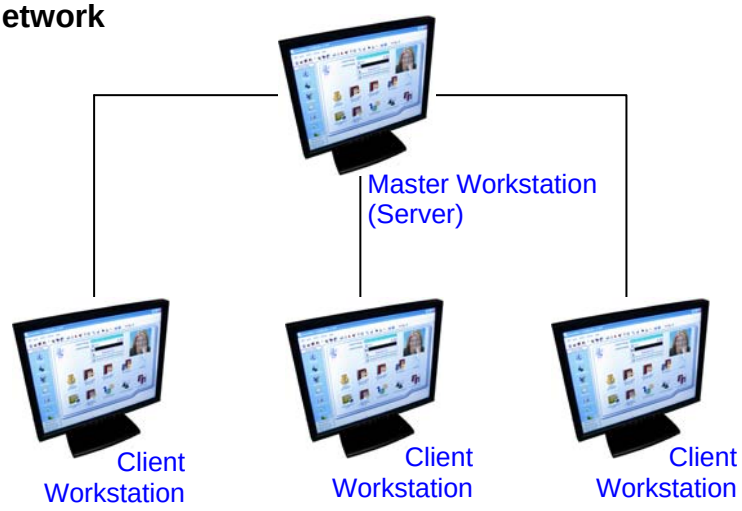
Networking

TaskMaster can be used on a client server network, allowing multiple users to have the program open and in use at the same time. Sites can have multiple employees taking payments, renting spaces, and doing other accounting functions at the same time. This is often used on large sites with many customers and multiple points of sale. After purchasing the main TaskMaster license for the server, you must purchase an additional client license for each client computer that TaskMaster will be networked to. A separate Pervasive Summit 10 Workgroup License is also required. Up to 10 user workstations can be set up using Pervasive Summit 10. If more user workstations are needed, then Pervasive Server must be purchased separately.

Each computer on the network must meet Chamberlain Access Solutions system requirements (found in chapter 1). The Network should be set up by an experienced, knowledgeable Network Information Technology professional. Chamberlain Access Solutions does not provide this service.

The Master Workstation or Server can be used as a point of sale. Therefore, if the site needs two points of sale, one will function as the Master Workstation (Server) and the other will be a Client Workstation. This is only for file sharing purposes and has no visible impact on day-to-day users.

Client Server Network



Network Setup within TaskMaster

Once the Network is set up, follow the steps below. These steps should be performed only by a trained, experienced Network Information Technology professional.

1. Install TaskMaster and Pervasive Summit 10 on the Master Workstation (Server) and on all Client Workstations.

2. Delete all W3*.* & WB*.* files from the C:\RTM folder and any subfolders on the Master Workstation (Server) and on all Client Workstations.

3. On the Master Workstation (Server), share the c:\ directory on which TaskMaster is installed. On all Client Workstations map a drive to the Master Workstation (Server).

4. On all Client Workstations delete all files in the c:\RTM\files folder.

5. On all Client Workstations, right-click on the TaskMaster icon on the desktop and select 'Properties.' **Target** needs to read **C:\rtm\rtm.exe $WS $drive D:** The **Start In** area must read "*mapped drive letter*:\rtm" (Ex: D:\ is the mapped drive, thus in the Start In area it should say D:\RTM)

6. Copy the contents of the rpts folder from the C:\rtm\rpts on the Master Workstation (Server) to C:\rtm\rpts all Client Workstations.

7. Copy RTM.exe from the C:\RTM folder on the Master Workstation (Server) to the C:\rtm folder on all Client Workstations.

8. Contact technical support at (888) 528-7826 to activate the Network and verify operation.

Gate Interface

TaskMaster can be interfaced to many Gate Access Control Systems, allowing clients who do not pay their bills to be automatically locked out from accessing the property. When the client pays their bill, then the system can automatically restore the client's access privileges or, in the case of checks, wait ten days to restore access. Also, as new clients are added to TaskMaster, their access code and some client information will automatically transfer into the Gate Access Control System.

Setting up the Gate Interface

We recommend that TaskMaster be interfaced to the Falcon or Falcon XT Access Control Systems for a truly integrated system and to increase your satisfaction with the overall performance of the interface. However, we also offer an interface to many other gate access control systems, including Frame 500, Demco, Sentinel, MSTC, Minimax, DigiGate, Wham, and SSI. Generally, these companies will charge a fee for the Gate Interface. If you wish to set up the gate interface to one of these companies, contact technical support to obtain our side of the interface and then contact the Gate Access Control System for their side.

Once the interface is set up, open TaskMaster and select **Utilities/Special Functions/ Synchronize Access System**. This performs the initial download to the Gate Access Control System.

Downloading to a Gate Access Control System

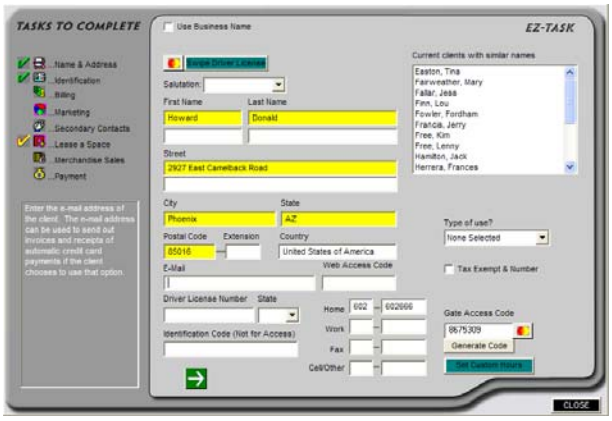
During day-to-day operations, the Gate Interface will automatically download to the Gate Access Control System whenever a client change occurs. Anytime a space is rented, suspended, vacated, or transferred, the information will automatically download into the Gate Access Control System.

If the Gate Access Control System connection is ever lost, the system can be re-synchronized by selecting Utilities**/Special Functions/Synchronize Access System**.

Gate Access information is input on the **Security Access** screen under **Client Data** on the Taskbar.

Security Access Screen

The Security Access screen allows changes to a client's access when TaskMaster is interfaced to a Gate Access Control System. This screen is accessed by clicking on **Client Data/Security Access**.



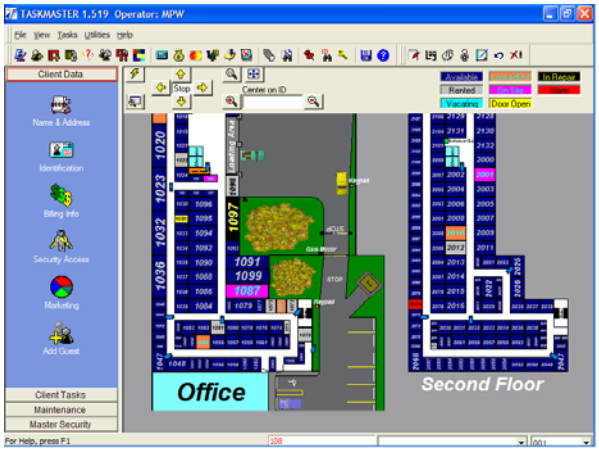
On newer systems, the only features used with these gate systems are the access code, time zone, alert, and expiration date.

If you are using swipe cards for access and you have the card swipe reader, click **Swipe** and swipe the card through the Credit Card Reader (which can scan access cards also). After making any changes to this screen, click **Apply**.

The access code and custom hours can be set for a client on the **New Client Move-in** wizard on the **Identification** screen.

Site Master Graphics

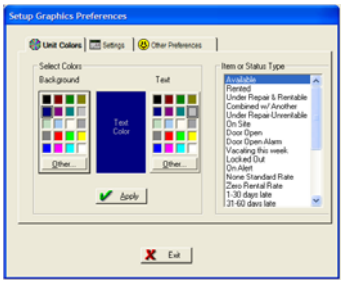
The Site Master Graphics module allows the manager to have a graphic view of the site that shows the current status of each space from an overhead view. If you have purchased the Site Master Graphics module, click on **Site Master Graphics** to open the module.



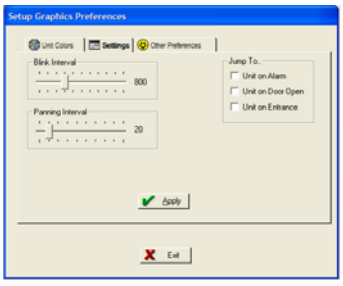
The Site Master Graphics view shows the status of site spaces using color codes to show Available spaces, Rented spaces, Locked Out spaces, Vacating spaces, and Spaces In Repair.

Site Master Graphics Setup

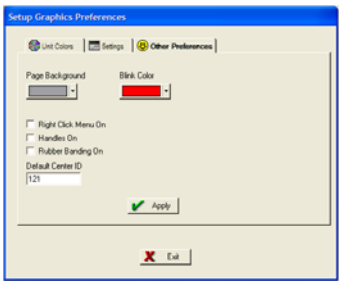
The first time that you use Site Master Graphics, technical support will have to dial into your site's computer to set it up. In most cases, a Graphics Technician will draw the site based on a site layout map that you provide. In some cases, either you or the dealer may draw the site.



To customize Site Master Graphics for your site, click **Preferences**. This opens the Site Graphics Preferences window. The **Space Colors** tab allows you to customize the color code for the space status types. Select from the **Item or Status Type** list. Then select a **Background** and **Text** color. Click **Apply**. Repeat this for each Item or Status Type.



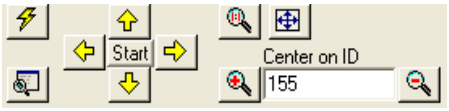
The **Settings** tab lets you change the speed of the **Blink Interval** (how fast the alarmed spaces blink) and the **Panning Interval** (speed of the site panning). The **Jump To** selections allow the Site Graphics to stop panning and center on **Spaces on Alarm**, **Spaces on Door Open**, or **Spaces on Entrance** if checked. Click **Apply** after making any changes.



The **Other Preferences** tab lets you customize the **Background Color** and alarm **Blink Color**. **Right Click Menu On**, **Handles On**, and **Rubber Banding** are used by technical support if corrections are needed to the site drawing. We do not recommend that these be used by the site because an untrained user can corrupt the site drawing. You can select a **Default Center ID** for the graphics to center on when stopped. Click **Apply** after making any changes.

Navigating in Site Master Graphics

Generally, in the Site Master Graphics view, the site will pan on the screen. This allows you to see each space on the site as the graphics pan over them. This panning can be stopped at any time by clicking **Stop**. To restart panning, click **Start**.



You can maneuver through the site picture using the arrow buttons to move Up, Down, Left, or Right. You can also maneuver through the site picture by right-clicking anywhere on the screen. This changes the mouse pointer to the **Move** hand pointer. Hold down the right-click button and move the mouse around to drag the picture.

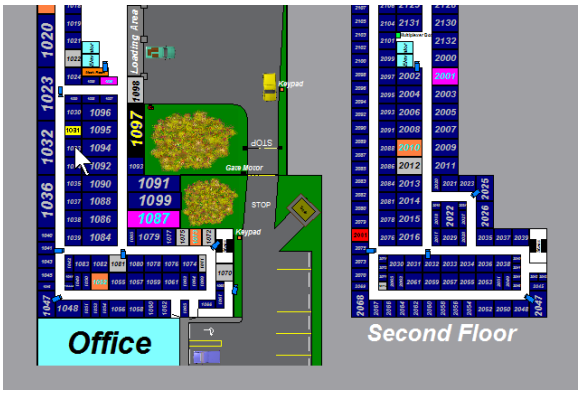
To jump to a specific space, type the space number in the **Center on ID** field.

To magnify a specific area of the screen, click **Zoom In**. To see more of the site, click **Zoom Out**. To see the entire site, click **Zoom 100%**.

If changes are made to the screen, click **Refresh** to update the view.

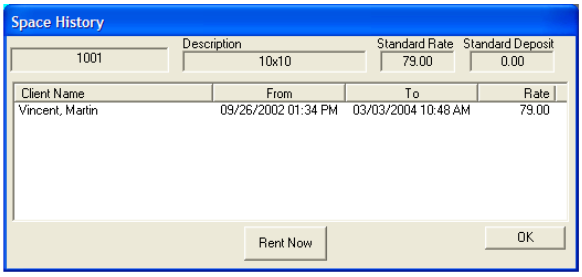
To view the screen in full screen mode, click **Full Screen**.

Viewing Space Information in Site Master Graphics



In the Site Master Graphics screen, you can obtain more information about a particular space by clicking on that space.

Clicking on Vacant Spaces

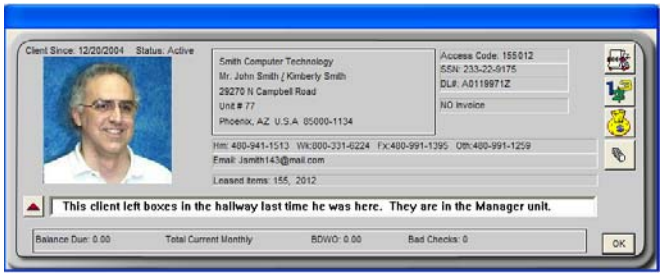


If you click on a vacant space, the **Space History** window will appear. This shows the space number, description, Standard Rate, Standard Deposit at the top of the screen. The center of the screen shows the last client that rented the space, the dates rented and the rate.

Click on **Rent Now** to go to the New Client Move-in wizard for the space. To exit the window without renting the space, click **OK**.

Clicking on Rented Spaces

If you click on a rented space, the **Client Information** window appears. This shows how long the client has been in the system and the current client status along with contact information, access code, Balance Due, Total Current Monthly, Bad Checks, and a list of Spaces/Leased items. The Scrolling Marquee can also be accessed in this window.



There are several quick link buttons on this window. Click on **Name & Address** to go directly to the Name & Address screen for this client. The **123 Accounting** icon takes you directly to the 123 Accounting screen for this client. The **Payment** icon takes you directly to the Payment screen for this client.

Clicking on **Client Information Sheet** prints a client information sheet that can be placed in their file. To exit the Client Information Window, click **OK**.

System Functions

- **Backup Data Files**
- **Automatic System Processing**
- **Special Functions**

Backup Data Files

It is important to regularly back up the data in TaskMaster. This allows the system to be restored in the case of a computer data corruption, theft, damage to the computer, computer crash, or other catastrophic data loss.

To back up the site data, select **File/ Backup Data Files**. This will backup the data files to the C:\RTM\Files\Bkup folder. This file can then be copied to an external data source such as a CD, DVD, Flash Drive, or External Hard Drive. We strongly recommend that this file be stored on an external data source to protect against computer theft or crash.

There is an automatic system backup that occurs each day when ADP runs. This backup stores information for the previous seven days. Each day this is overwritten with the new ADP backup. This backup is used for extra system protection and should not be relied on as the sole backup.

NOTE: The Restore Data Files feature is restricted to technical support personnel. If you feel that you need to restore your site data, please contact technical support.

Automatic System Processing

TaskMaster uses Automatic System Processing functions to assess rent and fees, update reporting, and perform other internal system maintenance. These functions are scheduled during the initial setup from **System Setup/Schedule Events**.

ADP (Automatic Daily Processing)
Automatic Daily Processing occurs each day, generally in the middle of the night. After all of the rents and fees are assessed and the financial information updated, automatic reports are printed. These are selected from **System Setup/Automatic Reports**.

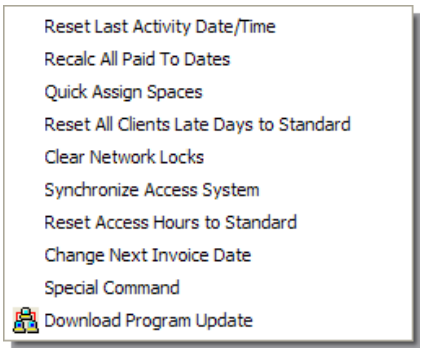
AWP (Automatic Weekly Processing)
Automatic Weekly Processing occurs each week, generally on Sunday evening. After the financial information is updated, automatic reports are printed. These are selected from **Site Setup/Automatic Reports**.

AMP (Automatic Monthly Processing)
Automatic Monthly Processing occurs each month, generally on the last day of the month in the evening. After the financial information is updated, automatic reports are printed. These are selected from **Site Setup/Automatic Reports**.

AYP (Automatic Yearly Processing)
Automatic Yearly Processing occurs each Year, generally on the 1st day of the new year in the morning. After the financial information is updated, automatic reports are printed. These are selected from **Site Setup/Automatic Reports**.

Special Functions

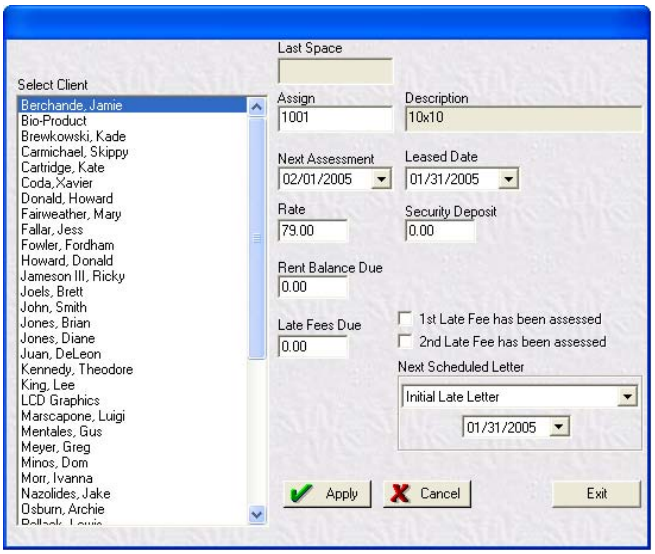
The **Special Functions** menu can be found under **Utilities** on the menu bar. These functions generally should not be used without the guidance and instruction of technical support.



Reset Last Activity Date/Time
Resets the Date and Time in TaskMaster to match the date and time in the computer. This is used if the computer's date and time has been changed for any reason.

Recalc All Paid to Dates
Used only by technical support to make corrections to Paid to Dates on very early versions of TaskMaster. Paid to Dates are calculated differently by newer versions of Taskmaster.

Quick Assign Spaces
The Quick Assign Spaces function is used when converting from an old management software or paper-based system to TaskMaster. You can quickly add clients to spaces by going down the list of names and assigning a space. If this function is needed, technical support will guide you through the first few accounts.



Reset All Clients Late Days to Standard
If a change is made to the late fee structure due to law change or site policy change, the change must be made in the **Site Policies** tab of the **Site Setup** function. This will affect any new clients. If the change is to be made to existing clients also, the Reset all Clients Late Days to Standard is used. This only affects the Late Days and not the Fees; if the change needs to also affect Fees, contact technical support.

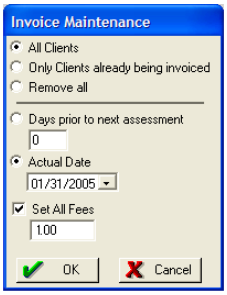
NOTE: Most states require a minimum of 30 days notice to the customer prior to a rate change.

Clear Network Locks
This function is used on Network modules. If one operator's computer has a client's account open and an operator on another networked computer tries to open the same file, a message will appear letting the second operator know that they cannot open the file. On occasion, if the first computer crashes or is turned off without releasing the file, the file will become stuck. The Clear Network Locks function releases these locked files.

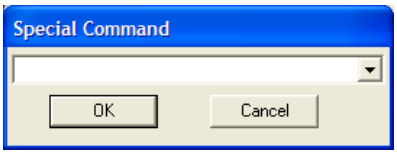
Synchronize Access System
Used during the initial interface between TaskMaster and the Gate Access control system.

Reset Access Hours to Standard
Used if a site has custom hours set up for individual clients but needs to change all existing clients back to the standard hours as set up on **Site Setup/Access**.

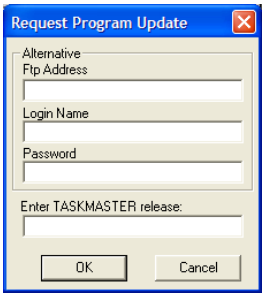
Change Next Invoice Date
Allows a site to change the invoicing for all clients or just those already being invoiced. It can also remove all invoicing at one time.



Special Command
Special Commands are used by technical support for certain unusual tasks. Do not attempt to use this function without assistance from technical support.



Download Program Update
Allows a site to update TaskMaster on a computer. This should only be done under the guidance and instruction of technical support or a trained representative at your Management Company.



Help

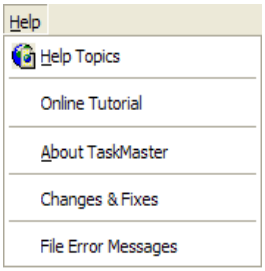
There are several ways to get assistance with TaskMaster. We offer a full range of training, documentation, and technical support to assist you with your technical issues and questions.

- **Training**
- **Help Menu**

Training

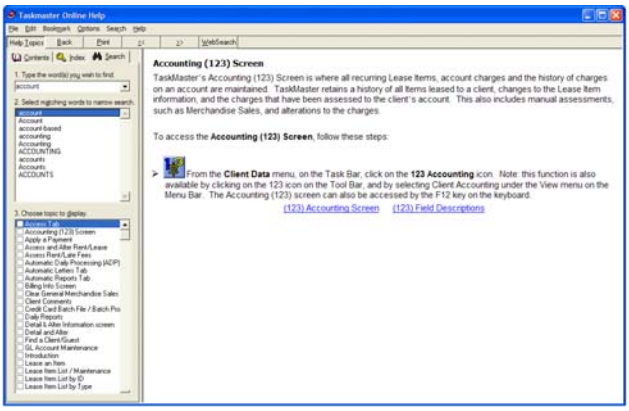
Comprehensive training is available for every level of user. We strongly recommend that every site take advantage of this training to help each user become familiar with the program. This training can be customized to your site's specific needs. Contact technical support for more information, scheduling, and costs.

Help Menu



The Help menu offers several levels of Help and assistance. Help Files, an Online Tutorial, a list of Changes & Fixes in each version, and definitions of File Error Messages.

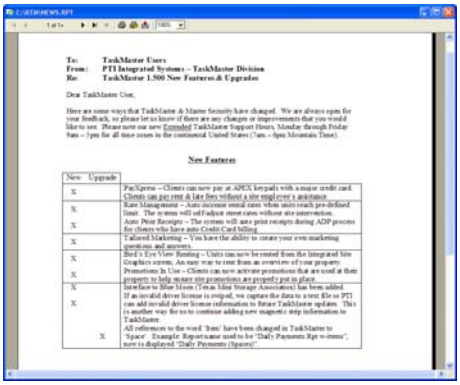
TM Online Help (Help Topics)



TM Online Help is available at anytime by clicking on **Help Topics**. This brings up the TaskMaster Online Help. You can search for Help topics in the Contents or Index, or search by keyword.

About TaskMaster

Clicking on **About TaskMaster** brings up a window that shows the version of TaskMaster installed on your system and provides links to technical support and our web site.

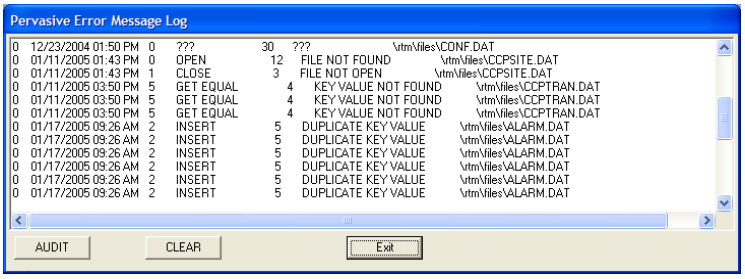


Changes & Fixes

Clicking on **Changes & Fixes** brings up a file that lists the version of TaskMaster installed on your system and the additions, changes, and fixes to that version.

File Error Messages

Clicking on **File Error Messages** brings up a window that lists recent Error Messages in TaskMaster. This can be used by technical support and your onsite computer technician to troubleshoot errors.



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- **Standard 2-Year Equipment Warranty**

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3.2.4.2. You shall not use the Software to develop any software or other technology having the same primary function as the Software, including but not limited to using the Software in any development or test procedure that seeks to develop like software or other technology, or to determine if such software or other technology performs in a similar manner or has a similar function as the Software.

3.2.4.3. If it is essential to do so in order to achieve operability of the Software with another software program, you must request Chamberlain Access Solutions to provide the information necessary to achieve such operability. Chamberlain Access Solutions has the right to impose reasonable conditions and to request a reasonable fee before providing such information. Any such information supplied by Chamberlain Access Solutions and any information obtained by you by such permitted decompiling may only be used by you for the purpose described herein and may not be disclosed to any third party or used to create any software which is substantially similar to the expression of the Software. Requests for information should be directed to the Chamberlain Access Solutions Engineering Department. Chamberlain Access Solutions does not guarantee that such requests will be approved or that such information will be provided.

3.2.4.4. You may not include the Software (whole or in part) in any commercial package without Chamberlain Access Solutions' written permission. The Software may not be distributed for profit in any form, including, but not limited to, electronic information service distribution, bulletin board distribution, user groups, online services, redistribution companies, and magnetic or optical medium distribution, unless explicitly stated in a separate writing and signed by an authorized representative of Chamberlain Access Solutions.

3.2.4.5. You may not alter the Software code for the purpose of redistributing or selling this program as a free or commercial program under another program name or company name.

3.2.5. You may not permit other individuals to use the Software except under the terms listed in this EULA.

3.2.6. You may not separate the component parts of the Software for use on more than one computer.

3.2.7. If you receive the Software in more than one medium, regardless of the type or size of medium that you receive, you may use only one medium that is appropriate for your single computer. You may not use or install the other medium on another computer. You may not loan, rent, lease, lend or otherwise transfer the other medium to another user, except as part of the permanent transfer of the Software as covered in the Transfer Section of this EULA.

3.2.8. You shall not copy the Software except as set forth in Section 2. Any copy of the Software that you make must contain the same copyright and other proprietary notices that appear on or in the Software.

3.2.9. User Responsibilities

3.2.9.1. Various states and municipalities have specific limitations and requirements for taxes, fees, customer notifications, auction processes, collections procedures, etc. It is the user's sole responsibility to verify the information and conduct their business in compliance with all applicable laws and codes. Chamberlain Access Solutions strongly recommends that the user verify all information in the Software that is applicable to their business and make themselves aware of their legal responsibilities, obligations, and limitations with respect to the use of the Software.

3.2.9.2. If your national, state, or local laws allow or require rights, liabilities, and warranties that are not expressly a part of this EULA then you are required to take all reasonable measures to avoid and reduce damages, in particular to make back-up copies of the Software and your computer data subject to the provisions of this EULA.

3.2.10. The Software may contain third party software which requires notices and/or additional terms and conditions and are made a part of and incorporated by reference into this EULA. By accepting this EULA, you are also accepting the additional terms and conditions, if any, set forth therein.

3.2.11. Any other party using this Software must comply with this EULA.

3.2.12. The registered licensed user of this Software is and shall remain ultimately responsible for compliance with all aspects of this EULA.

4. Ownership & Title

4.1. The structure, organization and code of the Software are the valuable trade secrets and confidential information of Chamberlain Access Solutions. The Software is protected by law, including without limitation the copyright laws of the United States and other countries, and by international treaty provisions as well as other intellectual property laws and treaties. Except as expressly stated herein, this EULA does not grant you any intellectual property rights in or to the Software, and all rights not expressly granted are reserved by Chamberlain Access Solutions.

4.2. Intellectual Property Rights

4.2.1. Logos, Trademarks, code, Product Names, belong to us

4.2.1.1. Chamberlain Access Solutions logos, product names, source code, software structure and organization copyrights, and trademarks contained in the Software are the property of Chamberlain Access Solutions. Third party trademarks, trade names, product names and logos may be the trademarks or registered trademarks of their respective owners. You may not remove or alter any trademark, trade names, product names, logo, copyright or other proprietary notices, legends, symbols or labels in the Software. This EULA does not authorize you to use Chamberlain Access Solutions' or its licensors' names or any of their respective trademarks.

4.2.1.2. All images, photographs, animations, video, audio, music, text, and "applets" incorporated into the Software, the accompanying printed materials, and any copies of the Software are owned by Chamberlain Access Solutions. This EULA grants you no rights to use such content. All rights not expressly granted are reserved by Chamberlain Access Solutions.

4.2.1.3. No rights or licenses are granted by Chamberlain Access Solutions under this EULA, expressly or by implication, with respect to any proprietary information or patent, copyright, trade secret or other intellectual property right owned or controlled by Chamberlain Access Solutions, except as expressly provided in this License.

4.3. Transfer of Software and License

4.3.1. Only users that purchased the License to the Software directly from Chamberlain Access Solutions or its authorized dealers shall have the one-time right to transfer this EULA and the Software to another end user. The initial user of the Software may, upon payment to Chamberlain Access Solutions of the fee required by this Section, make a one-time permanent transfer of this EULA and the Software only directly to another end user. This transfer must include all copies of the Software, including the backup copy, Documentation, component parts, the media and printed materials, any upgrades, and this EULA. Such transfer may not be by way of consignment or any other indirect transfer. The transferee of such one-time transfer must agree to comply with all of the terms of this EULA, including the obligation not to further transfer this EULA and Software and accompanying documentation.

4.3.2. In event of such transfer, you must inform Chamberlain Access Solutions in writing within 30 days with all information about the previous licensee and the new licensee (including, business name, contact person, business address, business phone number, business email address, and the reason for and date of the transfer).

4.3.3. Chamberlain Access Solutions charges a fee for this transfer that must be paid prior to the transfer, and you agree to pay such fee upon a transfer authorized under this Section. You must contact Chamberlain Access Solutions to make arrangements to pay this transfer fee. Chamberlain Access Solutions reserves the right to deny the transfer of this Software for any reason.

4.3.4. Software may not be transferred to another person if such transfer has not been paid for.

4.3.5. Your transfer of the Software does not convey any support subscription or rights to future upgrades to the new licensee. Support subscription plan and future upgrades must be purchased from Chamberlain Access Solutions separately by the new licensee.

4.3.6. All backups, loaded Software, and other electronic versions of the Software must be deleted or uninstalled from the initial user's computer upon a transfer under this Section.

4.3.7. Upon such transfer meeting these requirements, your License shall then be considered terminated as to you and all of your rights in this EULA are transferred to the new licensee. Notwithstanding the foregoing, this termination shall not relieve you of your obligations that have previously accrued under the EULA, which obligations shall survive such transfer and this termination.

4.4. Export Rules

4.4.1. None of the Software or underlying information or technology may be downloaded or otherwise exported or re-exported into any country prohibited by the United States Export Administration Act; to a national or resident of Cuba, Iran, Myanmar (Burma), North Korea, Sudan, Syria, or any other country to which the U.S. has embargoed goods who intends to transmit or transport the products back to such country; or to anyone on the U.S. Treasury Department's list of Specially Designated Nationals or the U.S. Commerce Department's Table of Denial Orders. By downloading or using the Software, you are agreeing to the foregoing and you are representing and warranting that you are not located in, under the control of, or a national or resident of any such country or on any such list.

5. License Compliance

5.1. You agree that Chamberlain Access Solutions or our authorized representative may audit your use of the Software for compliance with the terms of this EULA at any time, upon reasonable notice of 30 days.

5.2. In the event that such audit reveals any use of the Software by you other than in full compliance with the terms of this EULA, you shall reimburse Chamberlain Access Solutions for all reasonable expenses related to such audit in addition to any other liabilities you may incur as a result of such non-compliance, including payment of additional license fees.

5.3. Should legal action or arbitration be undertaken to enforce your compliance with this EULA, you agree to pay all court or arbitration costs, reasonable attorney fees, fines and punitive damages that arise there from for yourself and for Chamberlain Access Solutions.

6. Warranty

6.1. Limited Warranty

6.1.1. Chamberlain Access Solutions warrants that the Software will perform substantially in accordance with the accompanying written materials for a period of one year from the date of receipt by user if installed and used as directed by Chamberlain Access Solutions ("Limited Warranty Period"). Any modification or attempted modification of the Software by user shall void this Limited Warranty. Chamberlain Access Solutions does not warrant, however, that user's use of the Software will be uninterrupted or that the operation of the Software will be error-free or secure. During this Limited Warranty Period, user's sole and exclusive remedy for the breach of the foregoing Limited Warranty shall be the correction of or replacement of the Software, or if Chamberlain Access Solutions is unable to correct the Software using commercially reasonable efforts, to terminate this EULA, in which case only, the user shall receive a full refund from Chamberlain Access Solutions for the amount paid for the License and Software.

6.1.2. If applicable law requires any other warranties or implied warranties with respect to the Software, all such warranties are limited in duration to ninety (90) days from the date of delivery to user. Some states/jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to you.

6.2. Warranty Disclaimer

6.2.1. As-is

6.2.1.1. You expressly acknowledge and agree that use of the Software is at your sole risk. The Software is provided "AS IS", and on an "AS AVAILABLE" basis. The above Limited Warranty is exclusive and in lieu of and Chamberlain Access Solutions disclaims all other warranties, whether express, implied or statutory (to the extent permitted by applicable law), with respect to the Software, including but not limited to, warranties of quality, performance, title, non-infringement, merchantability or fitness for a particular purpose, and warranties created by course of dealing, course of performance or trade usage. The user acknowledges that it has relied on no warranties other than the express Limited Warranty set forth above, and that no warranties are or have been made by Chamberlain Access Solutions' dealers.

6.2.1.2. Any data downloaded through the use of the Software or from any Chamberlain Access Solutions source (including but not limited to the Chamberlain Access Solutions web site, Chamberlain Access Solutions FTP site, or remote connection by Chamberlain Access Solutions employees or representatives) is done at your own discretion and risk (even if recommended by a Chamberlain Access Solutions employee or representative) and you will be solely responsible for any damages to your computer system or loss of data that results from the download or use of any such material.

6.2.1.3. The Software is not designed, intended or licensed for use in Life Safety or hazardous environments requiring fail-safe controls, including without limitation, the design, construction, maintenance or operation of nuclear facilities, aircraft navigation or communication systems, air traffic control, and life support or weapons systems. Chamberlain Access Solutions specifically disclaims any express or implied warranty of fitness for such purposes.

6.2.1.4. No oral or written information or advice given by Chamberlain Access Solutions, its dealers, distributors, agents or employees shall create a warranty or in any way increase the scope of the Limited Warranty provided herein.

6.2.1.5. The Limited Warranty does not apply to software provided to you free of charge, for example, pre-releases, demonstration, product sampler, all of which are provided "AS IS," or software that has been altered by you or your representative.

6.2.1.6. This Limited Warranty is void if failure of the Software has resulted from force majeure, accident, abuse, or misapplication. Any replacement Software will be warranted for the remainder of the original Limited Warranty Period or thirty (30) days, whichever is longer.

7. Limitation of Liability

7.1. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO CIRCUMSTANCES AND UNDER NO LEGAL THEORY, TORT, CONTRACT, OR OTHERWISE, SHALL CHAMBERLAIN ACCESS SOLUTIONS, OUR OFFICERS AND EMPLOYEES (PAST, CURRENT AND FUTURE), OUR SUPPLIERS OR DEALERS BE LIABLE FOR ANY INDIRECT, SPECIAL, INCIDENTAL, PUNITIVE, COVER OR CONSEQUENTIAL DAMAGES INCLUDING WITHOUT LIMITATION, DAMAGES FOR COMPUTER FAILURE OR MALFUNCTION, LOST PROFITS, LOST SAVINGS, LOST BUSINESS, BUSINESS INTERRUPTION, LOSS OF DATA, LOSS OF USE, WORK STOPPAGE, PENALTIES, FINES OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES BY ANY PARTY, EVEN IF CHAMBERLAIN ACCESS SOLUTIONS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. SOME STATES DO NOT PERMIT DISCLAIMERS OF CERTAIN WARRANTIES OR LIMITATIONS ON CERTAIN TYPES OF LIABILTY UNDER CERTAIN CIRCUMSTANCES; CONSEQUENTLY SOME OF THE FOREGOING EXCLUSIONS MAY NOT APPLY TO YOU. IN SUCH STATES, THE LIABILITY OF CHAMBERLAIN ACCESS SOLUTIONS SHALL BE LIMITED TO THE GREATEST EXTENT PERMITTED BY LAW.
Chamberlain Access Solutions' cumulative liability under this EULA shall be limited to and never exceed the amount of license fees paid to purchase the Software giving rise to such liability or fifty United States dollars ($50), whichever is greater.

7.2. Chamberlain Access Solutions, our suppliers, and our dealers shall have no responsibility or liability if the Software has been altered in any way, or for any failure that arises out of use of the Software with a hardware configuration, platform, or operating system other than that recommended by Chamberlain Access Solutions.

7.3. The foregoing limitations on liability are intended to apply to all aspects of this EULA.

8. Hold Harmless

8.1. You agree to indemnify, hold harmless and defend Chamberlain Access Solutions, our officers and employees, agents, and dealers at your expense against any claims or demands, actions, proceedings and suits and all related liabilities, losses, actions, damages, penalties, fines, settlements, or claims (including all reasonable expenses, costs, and attorneys fees) without limitation arising out of or relating to any use of, or reliance on, any Chamberlain Access Solutions software or equipment.

9. Governing Law Jurisdiction

9.1. This EULA shall be governed by and construed under Arizona law without regard to choice of law provisions, except that questions affecting any copyright rights shall be determined by the law of the country in which such copyright issued. You hereby consent to the exclusive jurisdiction and venue of the state and federal courts sitting in Maricopa County, Arizona. In each case, this EULA shall be construed and enforced without regard to the United Nations Convention on the International Sale of Goods.

10. Enforceability

10.1. If any part of this EULA is found by a court of competent jurisdiction to be invalid, unlawful or unenforceable to any extent, that provision shall be reformed only to the extent necessary to make it enforceable and will be enforced to the maximum extent permissible, and the remaining terms, conditions and provisions of the EULA as amended will continue to be valid and enforceable to the fullest extent permitted by law.

11. User Remedies

11.1. Chamberlain Access Solutions' and its suppliers' entire liability and your exclusive remedy shall be, at Chamberlain Access Solutions' option, either refund of the purchase price paid for or the repair or replacement of the Software. Outside the United States, neither these remedies nor any product support services offered by Chamberlain Access Solutions are available without proof of purchase from a Chamberlain Access Solutions authorized distributor.

11.2. You agree that any legal challenge to this EULA or any dispute or controversy regarding the terms of this EULA must, at the sole option of Chamberlain Access Solutions, be pursued via binding arbitration in Maricopa County, Arizona, USA. You agree to select an Arbitrator that is knowledgeable about software and is a member of a major national arbitration association that is acceptable to Chamberlain Access Solutions and you agree to pay for any and all arbitration fees. You also agree that the arbitration will be binding and shall finally settle any dispute or controversy regarding the terms of this EULA and that you will pursue no further legal challenges, lawsuits, or appeals before or after the arbitration. This agreement to arbitrate is also intended to include any disputes, controversy or claims that you may have against any of Chamberlain Access Solutions' employees, agents, representatives or outside legal counsel arising out of or relating to matters covered by this EULA. You and Chamberlain Access Solutions agree that the decision from the arbitration may be entered in any court of competent jurisdiction. You, Chamberlain Access Solutions and the arbitrator shall treat all aspects of the arbitration proceedings, including without limitation discovery, testimony, other evidence and briefs as confidential.

12. Upgrades and Updates

12.1. Chamberlain Access Solutions may from time to time present programming fixes, modifications, variations, updates and revisions (collectively “updates”) to you, including version updates to the Software. You may accept or reject such updates to you, including version updates at your sole discretion as long as you acknowledge that any obligation Chamberlain Access Solutions may have to support the previous versions of the Software shall be considered to have ended upon the date of availability of the update.

12.2. If the Software is an update to a previous version of the Software, you must possess a valid license to such previous version in order to use such update. All updates are provided to you on a license exchange basis. You agree that by using an update you voluntarily terminate your right to use any previous version of the Software. As an exception, you may continue to use previous versions of the Software on your computer after you use the update but only to assist you in the transition to the update, provided that the update and the previous versions are installed on the same computer; the previous versions or copies thereof are not transferred to another party or computer unless all copies of the update are also transferred to such party or computer.

12.3. Notwithstanding any other terms in this EULA, if the Software is licensed as an upgrade or Module, then you may only use the Software of the Module to upgrade previously validly licensed versions of the Software. You agree that the Module does not constitute the granting of a second license to the Software (i.e., you may not use the Module separate and in addition to the Software that the Module is upgrading, nor may you transfer to a third party the originally licensed Software which is being upgraded separate from the Module).

12.4. Unless explicitly stated otherwise, any new features that augment or enhance the current Software, including the release of new updates, shall be subject to terms of this EULA.

13. Agreement

13.1. Complete Agreement

13.1.1. This EULA constitutes the entire agreement between the parties with respect to the subject matter hereof, and supersedes all prior or contemporaneous understandings or agreements, written or oral, regarding such subject matter. No amendment to or modification of this EULA will be binding unless in writing and signed by the Chief Executive Officer of Chamberlain Access Solutions.

13.1.2. Installation or use of this Software for any period of time constitutes your acceptance of this EULA and agreement to be subject to its contents.

13.1.3. You agree that any varying or additional terms contained in any purchase order or other written notification or document issued by you in relation to the Software licensed hereunder shall be of no effect.

13.1.4. The failure or delay of Chamberlain Access Solutions to exercise any of its rights under this EULA or upon any breach of this EULA shall not be deemed a waiver of those rights or of the breach.

13.1.5. The terms of this EULA shall be binding upon and inure to the benefit of all permitted transferees and assignees of Chamberlain Access Solutions and user.

13.2. Termination of EULA

13.2.1. This License is effective until terminated. You may terminate this License at any time by destroying the Software and related Documentation and all copies thereof. This License and your right to use the Software will terminate thirty (30) days after receipt of the Software, unless the Software is registered with Chamberlain Access Solutions with appropriate compensation and registration information.

13.2.2. In the event that you fail to comply with this EULA, Chamberlain Access Solutions may terminate the License and you must destroy or certify in writing the destruction of all copies of the Software in your possession. The termination of this EULA does not relieve either Chamberlain Access Solutions or user of its rights and obligations that have previously accrued. Terms herein that by their nature prescribe continuing obligations and rights shall survive the termination or expiration of this EULA.

13.2.3. This EULA is immediately terminated in the event you are refunded the purchase price for whatever reason and you may no longer use the Software without the written consent of Chamberlain Access Solutions.

13.2.4. Upon termination of this EULA you must destroy or certify in writing the destruction of the Software along with any backups and copies, uninstall it from any computers, and you must no longer use the Software in any way. Chamberlain Access Solutions reserves the rights as listed in Section 5 to audit your compliance and ensure that you have destroyed all of your copies of the Software, uninstalled it from any computers and that you are no longer using the Software in any way.

13.2.5. It is your responsibility to comply with the terms of this EULA and to obey the laws of your jurisdiction. Your rights under this EULA will terminate immediately and without prior notice if you violate any term of this License, including violating any applicable laws or rights of any third party including the intellectual property rights of any such third party. You may be subject to legal action if you continue to use the Software in violation of this EULA.

13.2.6. Termination of the EULA by either party cancels any rights that you have under this EULA but does not terminate any of Chamberlain Access Solutions' rights or protection that have accrued under this EULA. All provisions which must survive in order to give effect to their meaning, shall survive any expiration or termination of this EULA, including without limitation all of your representations, responsibilities, and indemnification obligations.

14. Technical Support Services

14.1. Chamberlain Access Solutions may provide you with Technical Support services related to the Software. With respect to technical information you provide to Chamberlain Access Solutions as part of the Technical Support services, Chamberlain Access Solutions may use such information for its business purposes, including for product support and development. Chamberlain Access Solutions will not utilize such technical information in a form that personally identifies you.

14.2. Chamberlain Access Solutions Technical Support service may have fees and costs associated with utilizing and engaging such services with the Software over and above the original purchase price of the License to use the Software. By using or installing the Software and requesting that Chamberlain Access Solutions provide Chamberlain Access Solutions Technical Support service, you agree to pay to Chamberlain Access Solutions these fees and costs, including any reasonable collection fees, late fees, and interest in a timely manner as a part of this EULA.

15. Notice and Contact Information

15.1. All notices, requests, demands and other communications under this EULA shall be in writing and duly given or made: (a) on the date delivered in person and acknowledged in writing; (b) on the date transmitted by facsimile, if confirmation is received; (c) three days after deposit in the mail if sent by certified U.S. mail postage prepaid, return receipt requested; and (d) one day after deposit with Federal Express or other nationally recognized overnight carrier service or overnight express U.S. mail with service charges or postage prepaid. Such notices, requests, demands or other communications concerning this EULA shall be directed and sent to Chamberlain Access Solutions' Customer Service Manager at Chamberlain Access Solutions at the following address or fax number, 9160 East Bahia Drive, Scottsdale, Arizona 85260, (480) 991-1395 (fax number), or as otherwise designated by Chamberlain Access Solutions.

Standard 2 Year Equipment Warranty

Chamberlain Access Solutions warrants products and equipment manufactured by Chamberlain Access Solutions to conform to its own specifications and to be free from defects in materials and workmanship, under normal use and service, for a period of two years from the date of shipment. Within the warranty period, Chamberlain Access Solutions will repair or replace, at its option, all or any part of the warranted product which fails due to materials and/or workmanship. Chamberlain Access Solutions will not be responsible for the dismantling and/or re-installation charges. To utilize this warranty, the customer must be given a Return Material Authorization (RMA) number by Chamberlain Access Solutions the customer must pay all shipping costs for returning the product to Chamberlain Access Solutions

This warranty does not apply in cases of improper installation, misuse, failure to follow the installation and operating instructions, alteration, abuse, accident, tampering, natural events (lightning, flooding, storms, etc.), and repair by anyone other than Chamberlain Access Solutions.

This warranty is exclusive and in lieu of all other warranties, expressed or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose. Chamberlain Access Solutions will not be liable to anyone for any consequential or incidental damages for breech of this warranty or any other warranties.

This warranty will not be modified or varied. Chamberlain Access Solutions does not authorize any person to act on its behalf to modify or vary this warranty. This warranty applies to Chamberlain Access Solutions products only. All other products, accessories, or attachments used in conjunction with Chamberlain Access Solutions equipment, including batteries, will be covered solely by their own warranty, if any. Chamberlain Access Solutions will not be liable for any direct, incidental, or consequential damage or loss whatsoever, caused by the malfunction of product due to products, accessories, or attachments of other manufacturers, including batteries, used in conjunction with Chamberlain Access Solutions products.

This warranty does not warrant the replacement of batteries that are used to power Chamberlain Access Solutions products.

The customer recognizes that a properly installed and maintained security system may only reduce the risk of events such as burglary, robbery, personal injury, and fire. It does not insure or guarantee that there will be no death, personal damage, and/or damage to property as a result. Chamberlain Access Solutions does not claim that the Product may not be compromised and/or circumvented, or that the Product will prevent any death, personal and/or bodily injury and/or damage to property resulting from burglary, robbery, fire, or otherwise, or that the Product will in all cases provide adequate warning or protection.

Chamberlain Access Solutions products should only be installed by qualified installers. The customer is responsible for verifying the qualifications of the selected installer.

Chamberlain Access Solutions shall have no liability for any death, injury, or damage, however incurred, based on a claim that Chamberlain Access Solutions Products failed to function. However, if Chamberlain Access Solutions is held liable, directly or indirectly, for any loss or damage arising under this limited warranty or otherwise, Chamberlain Access Solutions' maximum liability will not in any case exceed the purchase price of the Product, which will be fixed as liquidated damages and not as a penalty, and will be the complete and exclusive remedy against Chamberlain Access Solutions.

Glossary

A

ADP (Automatic Daily Processing): Daily processing that assesses rent and late fees, prints invoices and reports, and closes the credit card batch. This MUST be run daily, generally before the start of business hours. This is usually set up to run automatically.

AMP (Automatic Monthly Processing): The monthly processing that computes monthly totals for reporting. Generally this takes place on the last day of the month and is set up to run automatically.

AWP (Automatic Weekly Processing): The weekly processing that computes weekly totals for reporting. Generally this takes place on Sunday and is set up to run automatically.

AYP (Automatic Yearly Processing): The yearly processing that computes all yearly totals for reporting. Generally this takes place on the last day of the last month of the year and is set up to run automatically.

Anti-passback: An access control function meant to prevent tailgating through gates or doors that are controlled by keypads. It works by preventing a tenant from using the exit keypad if they didn't key into the entrance keypad OR preventing a tenant from using the entrance keypad if they didn't key out the last time they left the property. They must go to the office to have the manager log them off the property.

Assess: To impose a rate or fee to an account.

Alteration: A change to an account.

B

Boot: To start the computer by pressing the power button on the front of the CPU.

C

Central Office: A module in TaskMaster that allows a main site (headquarters) to run reports and financial information from remote sites (facility locations).

Client Credits: A function that holds excess funds that have not yet been applied to the rent or fees on a space. These funds are held in a "bucket" on the tenant's account until they are applied by the manager.

Client Server Network: A network that has one Master Workstation or Server that acts as an information hub on the network along with one or more Client Workstations used to access this information.

Client Workstation: A workstation or computer on a Client Server Network used to access information.

Convert: To combine two or more spaces together into one space in TaskMaster.

Converter: A device used to translate one electronic protocol/language to another. For example: RS485 to RS232 or RS232 to USB.

Cursor: A blinking line, flashing box, arrow, or other symbol on the computer screen that shows you where you can type or allows you to select an icon or checkbox.

CVV2 (Card Verification Value): A three or four digit number on the back of a credit card that is not stored in the magnetic strip. This number is used to prevent fraud from stolen credit card numbers.

C:\ : The primary hard drive on most computers is referred to as the 'C' drive.

D

Device: Keypad, multiplexer, relay board, or other equipment used with the Access Control System.

Desktop: In Microsoft Windows, the main screen of the computer. Usually contains shortcut icons that allow users to quickly access commonly used programs.

Domain: Unique name used to identify an organization on the internet. Example: www.ptiaccess.com.

Double-click: In a standard computer setup, this means to quickly tap the button on the left side of a mouse twice.

E

EZ Task: The main screen of TaskMaster with shortcuts to the 10 most common functions.

E-mail: Electronic transmission of messages over a network.

F

Field: An area within a program where you can type data. Usually a white box with a cursor.

Firewall: A program or hardware located on a network gateway or server that protects the network from access by non-authorized users.

FTP (File Transfer Protocol): A standard Internet protocol used to exchange files between computers on the internet.

G

GL (General Ledger): Account codes used for business accounting for reporting purposes.

Group No.: Used to distinguish between remote sites for the Central Office Software or FTP uploading.

Guest: An additional person on an account. May be an emergency contact, secondary contact, or true guest.

H

HTTP (Hyper Text Transfer Protocol): A protocol that defines how web sites are formatted, how they function, and how they are displayed on the Internet.

Hub: A common connection point for devices (computers, printers, etc) within a Local Area Network.

I - J

Icon: Small pictures on the computer screen that represent functions or programs that can be run by clicking on them.

IP (Internet Protocol): A unique number assigned to identify a computer host on the internet. Also called an IP Address. Usually represented by groups of numbers separated by a period or “dot”. For example 233.22.354.4

IT (Information Technology): A term referring to the study of computer processing and networks.

ISP (Internet Service Provider): A company that provides access to the internet.

Integer: A term for a whole number without decimals or fractions. Positive integers are greater than zero and negative integers are less than zero.

Intranet: An in-house web site that serves the employees of a business. May be linked to the Internet but is not a site accessed by the general public.

K

Kiosk: A freestanding computer station similar to an ATM that allows tenants to rent spaces, make payments, and move out of spaces, without having to interact with a site representative. TaskMaster can interface with *SAM* and Open Tech Alliances *Insomniac*.

L

Late Fees: A charge that may be assessed if the tenant does not pay rent by the required time.

LAN (Local Area Network): Generally, a small network located inside one building or business used to connect the computers together.

Levels: User rights to access information within TaskMaster. May be Unrestricted, Level 1, Level 2, or Level 3, with Unrestricted as the highest amount of access and Level 3 as the least amount of access.

Letter Fees: A charge that is assessed when a letter is printed, such as a late letter or auction letter. Even though this charge may be assessed with a late letter, it is NOT the same as a late fee. This is a separate charge.

M

Main Site: In Central Office, this is where the software is run from. Usually this is the headquarters.

Master Workstation: A computer that acts as a server on a client server network, but also can be used as a workstation.

Merge Fields: Variables that may be placed within letters that reference specific information in TaskMaster that is different for each tenant.

Modem: A device that allows computers to access the internet or another computer through telephone lines.

Multiplexer: A connection point for door alarms within the Access Control system. Also called a *Mux*.

Mux: see multiplexer.

N

NSF (Non-Sufficient Funds): The state that occurs when a check that is presented against a bank account does not have enough funds on deposit to cover the check.

Network: Two or more computers and other devices, such as printers, that are connected together into one system allowing information to be accessed from multiple computers.

Non-Client Sale: A sale of merchandise to a customer who is not an existing tenant or client within the TaskMaster Database.

O

Open Tech Alliance: A company that sells a kiosk that can be interfaced to TaskMaster.

P – Q

P2P (Peer to Peer): A network setup where each computer on the network acts as the server as needed. Generally used for small household networks. TaskMaster Networking does NOT work on a Peer to Peer Network.

PayXpress: A module within TaskMaster that allows tenants to pay rent and fees at the keypad.

Pending Folder: Location where letters, invoices, and automatic credit cards have to be printed if they are not set to print automatically during the ADP process.

Provider: See ISP.

Protocol: Rules governing transmitting and receiving of data. See RS232, RS485, and USB.

R

Region No.: A number used to distinguish between sites for Central Office and FTP uploading.

Relay board: A device used to control lights, elevators, and access. Available from Chamberlain Access solutions in 2 or 8 channels.

Remote Site: In the TaskMaster Central Office module, these are sites that are connected to the Central Office but are actually in a different location. Most commonly, these are the actual self storage business locations. In the Access Control system, a remote site is an unmanned site that is run from a main location.

Right-Click: In a standard computer setup, this means to press and hold the button on the right side of the mouse while the cursor is placed over an icon

Router: A device used on a network that forwards data on through another network.

S

SAM: A kiosk that can be interfaced to TaskMaster.

Server: A computer that controls and stores information on a network.

Single Click: In a standard computer setup, this means to quickly press the button on the left side of a mouse one time.

SMTP (Simple Mail Transfer Protocol): An internet protocol used to send e-mail.

Start Bar: see Task Bar

System Tray: An area on the right side of the Windows taskbar (usually in the lower right-hand corner of the screen) used to display the status of various functions.

T

Taskbar: In TaskMaster, the Taskbar is a bar along the left-hand side of the screen that has icons to access different parts of the program.

Tiered: Used in reference to late fees. Late fees can be set up in tiers or levels based on the rent amount.

Time Zone: Time Zones are a function of access control systems that work differently with each system. With the Falcon and Falcon XT Access Control Systems, Time Zones control the hours that a tenant is allowed to enter the site and the areas that they are allowed access into.

U – V

USB (Universal Serial Bus): A port on computers that connects with USB compatible devices.

VPN (Virtual Private Network): A private network that is configured within a public network (a carrier's network or the internet). This allows a less expensive WAN (wide area network) to be created on the internet so that you don't actually have to run private lines.

W – Z

WAN (Wide Area Network): 1. A network that generally connects separate buildings/sites owned by one company so that computers can access information between sites. 2. Another way to reference to the Internet.

Web Access Code: Code used with the WebXpress Module for the client to gain access to WebXpress to make payments or modify their account.

Workstation: A computer on a network that can be used to access the network.

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